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ABSTRACT

Competency-based instructional resources guides were developed for the secondary business educational offerings of legal office procedures, medical office procedures, recordkeeping, and office supervision and management. Task lists for each offering were validated by individuals from business, government, and professional organizations; experienced teachers; and/or content area experts. Initial drafts of the resource guides were prepared from the validated task lists, reviewed by selected business teachers and supervisors, revised, and field tested. To evaluate the guides' effectiveness in assisting teachers to meet Virginia's competency-based educational standards for vocational education, evaluation instruments were administered to teachers and students prior to and after the field testing. Evaluation outcomes indicated that both teachers and students believed courses to be competency-based. (Appendixes, amounting to almost four-fifths of the report, include the task/competency validation lists for all four offerings, validated task/competency lists, preassessment questionnaires, title pages and tables of contents for the four resource guides, field test evaluation instruments, and Virginia Vocational and Adult Education Competency-Based Education Standards: Requirements and Criteria.) (YLB)

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FINAL REPORT

Implementation of Competency-Based Education in Secondary Business Education

Exemplary Project

Conducted Under
Vocational Education Amendments of 1976
Public Law 94-482

B. June Schmidt
Virginia Polytechnic Institute and State University
213 Lane Hall

May 31, 1983

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TITLE: Implementation of Competency-Based Education in Secondary Business Education

AUTHOR: B. June Schmidt
Virginia Polytechnic Institute and State University

DATE: May 31, 1983

ABSTRACT:

This project, funded through the Virginia Department of Education, involved the development of competency-based instructional resource guides for the secondary business education offerings of Legal Office Procedures, Medical Office Procedures, Recordkeeping, and Office Supervision and Management. In the first year of the project, task lists for each of the offerings were validated by individuals from business, industry, government, and appropriate professional organizations and, in the case of recordkeeping, by experienced teachers and content area experts. Initial drafts of the resource guides were prepared from the validated task lists and were reviewed by selected business teachers and supervisors. In the second year of the project, the initial drafts were revised and completed according to the reviewers suggestions. They were then field tested. To evaluate the effectiveness of the guides in assisting teachers to meet Virginia's CBE standards for vocational education, evaluation instruments were administered to teachers and students prior to the field testing of the guides and after the guides had been field tested. The evaluation outcomes indicated that both teachers and students believed their courses to be competency based.

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ABSTRACT FOR FUNDING AGREEMENT WITH VOCATIONAL EDUCATION

TITLE OF PROPOSAL: Implementation of Competency-Based Education in Secondary Business Education

PROJECT DIRECTOR: Dr. B. June Schmidt, Assistant Professor

INSTITUTUTION: Virginia Polytechnic Institute and State University

LOCATION: Lane Hall, Blacksburg, VA 24061

FUNDING PERIODS: July 1, 1981 to May 31, 1982
July 1, 1982 to May 31, 1983

OBJECTIVES OF PROJECT:

1. To identify and validate lists of tasks/competencies appropriate for the Legal Office Procedures, Medical Office Procedures, Office Supervision and Management, and Recordkeeping courses.
2. To develop instructional resource guides in accordance with the format suggested by the Virginia Department of Education, Vocational and Adult Education for each course.
3. To involve Business Education Service staff members, business education supervisors, and business teachers in review of the resource guides as they are developed.
4. To coordinate the information in the resource guides with resource guides available or in process for other business education offerings to assure articulation with other offerings.
5. To field test the resource guides.
6. To develop procedures for evaluating the resource guides and their use and to conduct the evaluations.

PROCEDURES FOR IMPLEMENTATION:

The project was completed in four phases as follows:

Phase 1 Established procedures for working with school divisions and validated the task/competency list for each guide

Phase 2 Prepared initial drafts of the resource guides and had teachers, business education supervisors, and Business Education Service staff members review them

Phase 3 Revised the initial drafts of the resource guides and field tested the revised guides

Phase 4 Evaluated the effectiveness of the resource guides and completed the final, camera-ready copy of each guide

CONTRIBUTION TO VOCATIONAL EDUCATION:

Use of competency-based education in vocational offerings is a major objective for increasing the effectiveness of the offerings in meeting student needs. Teachers of the four approved business education courses included in this proposal do not have resource guide materials nor model competency-based offerings needed to achieve competency-based instruction in their courses. The resource guides developed through this project along with the field test of the guides will facilitate the implementation of competency-based instruction in the four courses.

PROBLEM AREA

The business education offerings of Legal Office Procedures, Medical Office Procedures, Office Supervision and Management, and Recordkeeping lack a model for having competency-based instruction implemented in them. These courses represent a vital part of the business education program at the secondary level and need resource guide materials for competency-based instruction to be effectively incorporated in them. The purposes of this project were to prepare resource guides for the four offerings, to field test the guides, and to evaluate the effectiveness of the guides.

Objectives of the Project:

The objectives of the project follow:

1. To identify and validate lists of tasks/competencies appropriate for the Legal Office Procedures, Medical Office Procedures, Office Supervision and Management, and Recordkeeping courses.

2. To develop instructional resource guides in accordance with the format suggested by the Virginia Department of Education, Vocational and Adult Education for each of the courses. Each guide includes:

   a. occupational/program information
   b. task/competency list which includes duty/content area for the domain
   c. performance objectives for each task/competency
   d. enabling objectives for each performance objective
   e. criterion-referenced measures for each task/competency
   f. instructional activities
   g. tool/equipment lists
   h. A/V and text references for each task/competency
   i. program/course descriptions
   j. course outlines for each course
   k. student organization information
   l. classroom management systems
   m. recording systems
   n. resource listing

3. To involve Business Education Service staff members, business education supervisors, and business teachers currently teaching each of the four courses in the review of the resource guides as they are developed.

4. To coordinate the materials in the resource guides for the four courses with resource guides available or in process for other business education offerings to assure articulation with other offerings.

5. To field test the resource guides.

6. To develop procedures for evaluating the resource guides and their use and to conduct the evaluations.

Project Design

The project was completed in four phases as outlined below.

Phase 1 Established procedures for working with school divisions and validated the task/competency list for each resource guide

Phase 2 Prepared initial drafts of the resource guides and had teachers, business education supervisors, and a Business Education Service staff member review them

Phase 3 Revised the initial drafts of the resource guides and field tested the revised guides in business education classes

Phase 4 Evaluated the effectiveness of the resource guides and completed the final, camera-ready copy of each guide

School divisions with the four offerings that participated in the project included:

School Division	Course
Norfolk City Portsmouth City Virginia Beach City	Legal Office Procedures and Medical Office Procedures
Fairfax County	Office Supervision and Management
Franklin County	Recordkeeping

Appendix A provides a list of individuals from these school divisions who reviewed and field tested each guide. In addition, the Business Education Service Staff member who served as liaison between the project director and the Business Education Service in development of the guides is listed.

PROJECT PROCEDURES PHASE 1: VALIDATION OF THE TASK/COMPETENCY LISTS

To begin Phase 1, the Project Director met with business education supervisors, selected teachers, and members of the Business Education Service staff on August 4, 1981, in Norfolk at the annual Business Education Conference. A meeting was also held on October 28, 1981, in Franklin County. Individuals attending the meetings expressed interest in the project and willingness to participate in it. Accordingly, procedures for validating the task/competency lists for each resource guide and for reviewing initial drafts of the guides were established at these meetings.

In addition, school divisions, community colleges, and four-year institutions involved in the Virginia competency-based articulation and implementation projects were contacted to secure resource guide materials that had been developed for other business education offerings. These materials plus the competency-based course outlines available from the Business Education Service were used as the basis for the task/competency validation lists for each of the courses. Vocational-Technical Education Consortium of States (V-TECS) materials that relate to the courses were also secured to verify that the task/competency validation lists contained the most current job-related tasks/competencies. Also, current texts and resource materials for the four offerings were obtained from business education publishers. The task/competency validation lists developed through this project for Legal Office Procedures, Medical Office Procedures, Office Supervision and Management, and Recordkeeping are provided in Appendix B.

On October 15, 1981, the Project Director met with the Norfolk City, Portsmouth City, and Virginia Beach City business education supervisors, to establish final procedures for distribution of the Legal Office Procedures and Medical Office Procedures validation lists. Each supervisor assumed responsibility for distributing ten copies of each list along with stamped envelopes to be used for their return. Validation lists were received from 18 Legal Office Procedures respondents

and 18 Medical Office Procedures respondents. Positions of the respondents are provided in Appendix C.

Copies of the task/competency validation list for Office Supervision and Management and stamped, return envelopes were distributed to members of professional business organizations in the Northern Virginia area and in the Roanoke area, 14 in each area, and to 26 instructors of office management in community colleges and four-year institutions. Responses were received from 21 of the business people and from 19 of the instructors. However, two instructors indicated that they did not consider the offering as appropriate for high school students and did not rate the tasks/competencies. Positions of the business respondents are provided in Appendix C.

Copies of the task/competency validation list for Recordkeeping along with stamped, return envelopes were sent to experienced recordkeeping teachers, state supervisors of business education, and recognized accounting/recordkeeping experts. Eleven of each were contacted with responses received from 10 of each for a total of 30 validated lists received.

The validated lists that served as the basis for the four resource guides developed through the project appear in Appendix D.

Validated Tasks/Competencies for Legal Office Procedures:

The validated list for Legal Office Procedures also contains tasks/competencies for Stenography I that the respondents rated 2.5 or above on a scale of 1-4, from "Not Applicable" to "Essential." Ratings the respondents assigned the tasks/competencies ranged from .94 to 3.0. Tasks/competencies from Stenography I are listed in the resource guide for Legal Office Procedures for the instructors information; however, objectives, criterion-referenced measures, instructional activities, etc. are not developed for them. The majority of the comments provided by respondents applied to the writing of the objectives and instructional activities and were considered as the resource guide was developed. The validated list contained

49 competencies for Legal Office Procedures distributed as follows:

Learning Areas	Number of Tasks/Competencies
Financial Records	1
General Clerical Skills	6
Receptionist Activities	5
Typewriting, General	3
Typewriting, Legal	15
Word Processing	11
Personal Employability Skills	2
Job Seeking Skills	2
Organizational Skills	4
Total	49

Validated Tasks/Competencies for Medical Office Procedures:

The validated list for Medical Office Procedures also contains tasks/competencies for Clerk-Typist I and Stenography I that the respondents rated 2.0 or above on a scale of 1-4, from "Not Applicable" to "Essential." Ratings the respondents assigned the tasks/competencies ranged from .88 to 3.0 with an overall tendency to rate the tasks/competencies lower than the Legal Office Procedures respondents. Hence the decision was made to include tasks/competencies with a rating of 2.0 or above in the validated list. Comments from the Medical Office Procedures respondents emphasized the importance of typewriting and medical terminology tasks/competencies. Information gained from the comments was incorporated as appropriate when the resource guide was prepared.

As described for the Legal Office Procedures resource guide, tasks/competencies from Clerk-Typist I and Stenography I are listed in the Medical Office Procedures guide for the instructors information; however, objectives, criterion-referenced measures, instructional activities, etc. are not developed for them. The validated list contained 37 competencies for Medical Office Procedures distributed as follows:

Learning Areas	Number of Tasks/Competencies
General Clerical Skills	3
Insurance	4
Typewriting	1
Receptionist Activities (includes a task/competency from Patient Preparation)	3
Word Processing	9
Personal Employability Skills	4
Job Seeking Skills	3
Organizational Skills	10
Total	37

Validated Tasks/Competencies for Office Supervision and Management

The validated list for the Office Supervision and Management resource guide contains tasks/competencies the respondents rated above 2.3 on a scale of 1-4, from "Not Applicable" to "Essential." The cutoff point was arbitrarily selected in order to retain a logical number of tasks/competencies in each learning area. A cutoff of 2.5 would have resulted in elimination of some skill areas and in only one task/competency remaining in others. Based on comments of the respondents, one task/competency was added--No. 5 under the learning area of Planning. It concerns the impact of changing technology on office workers. The validated list contains 38 competencies distributed as follows:

Learning Areas	Number of Tasks/Competencies
Planning	5
Organizing	4
Staffing	3
Directing	7
Controlling	7
Career Exploration	2
Personal Employability Skills	10
Total	38

Validated Tasks/Competencies for Recordkeeping

The validated list for the Recordkeeping resource guide contains tasks/competencies the respondents rated 2.5 or above. Ratings the respondents

assigned the tasks/competencies based on a scale of 1-4, from "Not Applicable" to "Essential" ranged from 1.9 to 3.0. The list reflects changes recommended by the validators. These include the deletion of exact number of times something should be performed and the addition of task/competency No. 14 in the Business Records learning area to reflect the impact of computers on information processing. The validated list includes 50 competencies, with the tasks/competencies distributed as follows:

Learning Areas	Number of Tasks/Competencies
Recordkeeping Fundamentals	4
Personal Records	12
Business Records	15
Accounting Fundamentals	6
Personal Employability Skills	13
Total	50

PROJECT PROCEDURES PHASE 2: PREPARATION AND REVIEW OF GUIDES

During Phase 2, review copies of the four guides were completed, based on the validated lists of tasks/competencies. The Project Director met personally with teachers and their supervisors from Franklin County, Norfolk City, Portsmouth City, and Virginia Beach City to distribute the guides and discuss review procedures. The Office Supervision and Management guide was mailed with review procedures established by phone. Copies of the guides were also submitted to the liaison Business Education Service staff member for review. Review of the guides was completed by July 1, 1982.

PROJECT PROCEDURES PHASE 3: FIELD TESTING OF GUIDES

For Phase 3, preliminary procedures for field testing the revised guides and for assessing the students' and teachers' attitudes toward CBE were discussed at a meeting of the project participants held on August 11, 1982 at the Annual Business Education Conference in Richmond.

Field Testing of the Revised Guides

The four guides were revised based on reviewer input. All parts of the guides were completed except for the final section on listing references and resources. Dates the guides were delivered to the teachers for field testing follow:

Guide	Date delivered for field testing
Recordkeeping	September 15, 1982
Legal Office Procedures	November 16, 1982
Medical Office Procedures	November 16, 1982
Office Supervision and Management	December 17, 1982

The Project Director personally delivered the revised guides to the Recordkeeping, Legal Office Procedures, and Medical Office Procedures teachers and supervisors. The Office Supervision and Management guide was mailed. Copies of the revised guides were submitted to the Business Education Service staff liaison as they were prepared.

Preassessment CBE Questionnaire Administration and Outcomes:

At the August 11, 1982 meeting of the project participants, they worked to revise questionnaires developed by the Project Director for assessing students' and teachers' attitudes toward CBE. Particular emphasis was given to simplifying the language used on the student questionnaire. The teachers administered the Student Preassessment CBE Questionnaires before the end of the first grading period of the 1982-83 school year. Further, each of the 6 participating teachers completed the Teacher Preassessment CBE Questionnaire. Copies of the two questionnaires appear in Appendix E.

Table 1 contains the number of responses for each item and percent of responses for each item for the 72 Recordkeeping students. Table 2 contains

Table 1

Responses of the Recordkeeping Students (N = 72)
to the Preassessment CBE Questionnaire

	Response							
	Most of the time		Some of the time		Seldom		Not at All	
Item	N	%	N	%	N	%	N	%
1. Are you informed of what is expected of you?	61	84.7	11	15.3	0	0.0	0	0.0
2. Are specific standards made known to you?	54	75.0	17	23.6	1	1.4	0	0.0
3. Are you tested on what is expected of you?	63	87.5	6	8.3	1	1.4	2	2.8
4. Are you assisted in achieving what is expected of you?	44	61.1	21	29.2	6	8.3	1	1.4
5. Is a record kept of what you have achieved?	54	75.0	13	18.0	4	5.6	1	1.4
6. Do you feel competency-based instruction can help you?	55	76.4	13	18.0	3	4.2	1	1.4

Table 2

Responses of the Legal and Medical Office Procedures Students (N = 78) to the Preassessment CBE Questionnaire

	Item	Response: Most of the time N	%	Some of the time N	%	Seldom N	%	Not at All N	%
1.	Are you informed of what is expected of you?	62	79.5	13	16.7	3	3.8	0	0.0
2.	Are specific standards made known to you?	55	70.5	21	26.9	2	2.6	0	0.0
3.	Are you tested on what is expected of you?	67	85.9	10	12.8	1	1.3	0	0.0
4.	Are you assisted in achieving what is expected of you?	58	74.4	15	19.2	5	6.4	0	0.0
5.	Is a record kept of what you have achieved?	70	89.7	6	7.7	0	0.0	2	2.6
6.	Do you feel competency-based instruction can help you?	57	73.1	16	20.5	4	5.1	1	1.3

similar information for the 78 Legal and Medical Office Procedures students, while Table 3 contains the information for the 18 Office Supervision and Management students. The Legal and Medical Office Procedures students' responses are combined since two teachers handle both programs in two of the schools. The items on both questionnaires were based on the four standards adopted by the Virginia Department of Education for implementing CBE in vocational education. The standards are provided in Appendix H.

Since the teachers participating in the project were attuned to the four standards and had already begun to meet the standards with their students, the students' responses to the 6 items on the questionnaire were generally concentrated in the "Most of the time" and "Some of the time" categories. Apparently, the students felt their courses were being taught by a competency-based approach. For the Recordkeeping students, 84.7 agreed that most of the time they are informed of what is expected (Item 1) and 87.5 agreed that most of the time they are tested on what is expected (Item 3). The item that the lowest percentage of the Recordkeeping students agreed with "Most of the time" was the one asking if they are assisted in achieving what is expected. This was Item 4 with 61.1 percent of the students selecting the "Most of the time" response.

For the Legal and Medical Office Procedures students, 89.7 percent agreed that "Most of the time" a record is kept of what they have achieved (Item 5) and 85.9 percent agreed that "Most of the time" they are tested on what is expected (Item 3). The item with the fewest "Most of the time" choices for the Legal and Medical Office Procedures students was Item 2 with 70.5 percent of the students choosing the "Most of the time" response when asked if specific standards for what is expected are made known.

The 18 Office Supervision and Management students agreed most strongly that their course was competency based. For both Item 2 about specific standards

Table 3

Responses of the Office Supervision and Management Students (N = 18) to the Preassessment CBE Questionnaire

		Response							
		Most of the time		Some of the time		Seldom		Not at All	
	Item	N	%	N	%	N	%	N	%
1.	Are you informed of what is expected of you?	14	77.8	4	22.2	0	0.0	0	0.0
2.	Are specific standards made known to you?	17	94.4	1	5.6	0	0.0	0	0.0
3.	Are you tested on what is expected of you?	16	88.9	2	11.1	0	0.0	0	0.0
4.	Are you assisted in achieving what is expected of you?	13	72.2	5	27.8	0	0.0	0	0.0
5.	Is a record kept of what you have achieved?	16	88.9	2	11.1	0	0.0	0	0.0
6.	Do you feel competency-based instruction can help you?	17	94.4	1	5.6	0	0.0	0	0.0

being made known and Item 6 about their feelings that competency-based education can help one learn, 94.4 percent of the students agreed with the "Most of the time" response. Similar to the Recordkeeping students, they gave the least favorable response to Item 4 regarding assistance received in achieving what is expected with 72.2 percent of the students agreeing with the "Most of the time" response.

The Preassessment CBE Questionnaire completed by the teachers contained items similar to the student questionnaire. Numbers of responses to the six items on the teacher questionnaire by the six teachers are listed below.

Item	Most of the time	Some of the time
a. Do you use CBE procedures in your classes?	4	2
b. Do you maintain a list or lists of competencies that your students are expected to achieve?	5	1
c. Do you have a measurable performance objective stated for each listed competency?	5	1
d. Do you inform students prior to instruction of expected performance?	6	0
e. Do you measure student achievement on the basis of specific standards made known to them prior to instruction?	6	0
f. Do you document student achievement of competencies?	5	1

The teachers apparently felt that their offerings complied more closely with the four CBE standards than the students' responses indicated. Four of the teachers had completed formal courses that addressed competency-based education and all had participated in in-service activities designed to help them implement CBE in their courses. In addition, they used a variety of CBE resource materials including task lists developed for this project, the

competency-based course outlines available for Business and Office Education through the Virginia Department of Education, V-TECS catalogs, textbooks and supplementary materials with clearly stated objectives, and lists of competencies they had developed.

PROJECT PROCEDURES PHASE 4: PREPARATION OF FINAL GUIDES

Phase 4 included completion of the four guides and preparation of camera-ready copy for each guide. The guides were field tested and reviewed according to procedures established in Phase 3 and were returned as follows:

Guide	Date returned
Recordkeeping	January 31, 1983
Legal Office Procedures	February 28, 1983
Medical Office Procedures	February 28, 1983
Office Supervision and Management	March 31, 1983

The guides were then revised based on input from the field testing and final review. Appendix F contains title pages and tables of contents for each of the final guides.

Phase 4 also included evaluation of the effectiveness of the field test of the guides. The questionnaire used for the students contained the same items as the preassessment questionnaire. The instrument used for the teachers contained items designed to evaluate whether use of the guides helped them meet Virginia's CBE standards for vocational education. The instruments were completed by the teachers and students during the final week of the field testing of each guide. Copies of the instruments appear in Appendix G.

Completion of the Legal Office Procedures Guide:

The final Legal Office Procedures guide contains the same number of tasks as the validated list. However, in the review process 3 tasks were deleted from

and 3 were added to the validated list. The duty areas and number of tasks for each in the final guide follow:

Duty Area	Number of Tasks
Financial Records	1
General Clerical Skills	6
Receptionist Activities	5
Typewriting, General	3
Typewriting, Legal	14
Word Processing	9
Legal Office Ethics	2
Job Seeking Skills	3
Personal Employability Skills	6
Total	49

Two tasks, "Typewrite a power of attorney" and "Typewrite a special power of attorney," were combined in the Typewriting, Legal area. In the Word Processing area, the first three tasks dealing with the use of legal terminology were combined into one task. The task requiring preparation for a job interview was added to the Job-Seeking Skills area. Finally, the Personal Employability and Organization Skills areas were reorganized into the Legal Office Ethics and Personal Employability Skills areas. Two tasks were added, one regarding participation in Future Business Leaders of America and the other regarding producing work of satisfactory quality.

Throughout the review process, the Task Analysis Section was modified according to the reviewer's input. Much effort was expended on carefully wording the tasks, performance objectives, enabling objectives, criterion-referenced measures, and instructional activities in this section. Other sections of the guide, particularly the Occupational Information Section, were also revised according to the reviewers' input. The final Legal Office Procedures guide contains 182 pages, including 8 introductory pages with the Table of Contents.

Completion of the Medical Office Procedures Guide:

The final Medical Office Procedures Guide contains one more task than the validated list. The duty areas and number of tasks for each in the final guide follow:

Duty Area	Number of Tasks
General Clerical Skills	4
Insurance	4
Typewriting	1
Receptionist Activities	5
Word Processing	9
Medical Office Ethics	6
Job Seeking Skills	3
Personal Employability Skills	6
Total	38

In the review process the Organizational Skills and Personal Employability Skills areas were reorganized. Six tasks were placed in the Medical Office Ethics area; the task regarding collecting payments from and sending bills to other physicians was moved to the General Clerical Skills area; and two tasks, one regarding handling medical emergencies and the other regarding the referring of calls from other physicians, were moved to the Receptionist Activities area. One task, "Participate in Future Business Leaders of America" was added.

As with the Legal Office Procedures guide, the Task Analysis Section was modified according to the reviewers' input throughout the review process. In addition, careful attention was given to the wording of the tasks, performance objectives, criterion-referenced measures, and instructional activities in the Task Analysis Section. The final Medical Office Procedures guide contains 178 pages, including 7 introductory pages with the Table of Contents.

Completion of the Office Supervision and Management Guide:

In the field-test and review process for the Office Supervision and Management guide, it was determined that the number of validated tasks retained was larger than the number of tasks that could be adequately achieved by the students in a one-year, one-period course. Accordingly, a number of tasks were deleted in the review process. The final guide contains 29 tasks distributed in duty areas as follows:

Duty Area	Number of Tasks
Planning	4
Organizing	3
Staffing	4
Directing	3
Controlling	2
Job Seeking Skills	6
Personal Employability Skills	7
Total	29

Eleven tasks were deleted from the Planning, Organizing, Directing, and Controlling areas. Two tasks were added, one to the Staffing area and the one regarding participation in Future Business Leaders of America to the Personal Employability Skills area. The field-test review procedures also resulted in extensive revision of the tasks that were retained. Emphasis was placed on generating measurable performance objectives for the tasks which were largely qualitative rather than quantitative in nature. Extensive attention was also given to wording of the enabling objectives, criterion-referenced measures, and testing strategies of the Task Analysis Section of the guide. The final Office Supervision and Management Guide contains 145 pages, including 7 introductory pages with the Table of Contents.

Completion of the Recordkeeping Guide:

The final Recordkeeping guide contains 40 tasks versus 50 retained in the validated list. The duty areas and number of tasks in the final guide follow.

Duty Area	Number of Tasks
Recordkeeping Fundamentals	4
Personal Records	9
Business Records	14
Accounting Fundamentals	6
Personal Employability Skills	7
Total	40

Similar to the Office Supervision and Management guide, the field-test and review process for the Recordkeeping guide revealed the need to reduce the number of tasks. Thirteen tasks had been retained in the Personal Employability

area, an unreasonable number for a recordkeeping teacher to monitor and stress. Accordingly, 7 tasks were eliminated from this area, 6 retained, and 1 added regarding participation in Future Business Leaders of America. In addition, 4 tasks were eliminated from the Personal Records and Business Records areas.

The review and field-test process also led to extensive revision in number of performances required within tasks and in levels of proficiency stated in the performance objectives. As with the other guides, extensive effort was expended on carefully wording the tasks, performance objectives, enabling objectives, criterion-referenced measures, and instructional activities of the Task Analysis Section. The final Recordkeeping guide contains 157 pages, including 7 introductory pages with the Table of Contents.

Field-Test Evaluation of the Guides:

Outcomes of the students' evaluation of the effectiveness of the field test of the guides are reported in Tables 4, 5, and 6. The questionnaires were completed by 74 Recordkeeping students, 69 Legal and Medical Office Procedures students, and 16 Office Supervision and Management students. As noted previously, the field-test questionnaire for the students contained the same 6 questions as the Preassessment CBE Questionnaire. The questions were based on the four standards adopted in Virginia for implementing competency-based procedures in vocational education. (Refer to Appendix H.)

For the Recordkeeping students, the responses to the first 5 questions increased in the "Most of the time" category from those reported in Table 1 for the Preassessment CBE Questionnaire. This increase occurred even though the percentages in the "Most of the time" category on the preassessment questionnaire indicated that the students felt they were being taught by a competency-based approach at that time. The largest increases were for Question 4, which asked about being assisted in achieving what is expected, from 61.1

Table 4

Responses of the Recordkeeping Students (N = 74)
to the Field-Test Evaluation Questionnaire

		Response							
		Most of the time		Some of the time		Seldom		Not at All	
	Item	N	%	N	%	N	%	N	%
1.	Are you informed of what is expected of you?	71	95.9	3	4.1	0	0.0	0	0.0
2.	Are specific standards made known to you?	69	93.2	4	5.4	1	1.4	0	0.0
3.	Are you tested on what is expected of you?	72	97.3	2	2.7	0	0.0	0	0.0
4.	Are you assisted in achieving what is expected of you?	61	82.4	12	16.2	1	1.3	0	0.0
5.	Is a record kept of what you have achieved?	73	98.6	1	1.4	0	0.0	0	0.0
6.	Do you feel competency-based instruction can help you learn?	46	62.2	24	32.4	3	4.1	1	1.3

Table 5

Responses of the Legal and Medical Office Procedures Students (N = 69) to the Field-Test Evaluation Questionnaire

		Response							
		Most of the time		Some of the time		Seldom		Not at All	
	Item	N	%	N	%	N	%	N	%
1.	Are you informed of what is expected of you?	60	87.0	8	11.6	1	1.4	0	0.0
2.	Are specific standards made known to you?	53	76.8	16	23.2	0	0.0	0	0.0
3.	Are you tested on what is expected of you?	58	84.1	10	14.5	1	1.4	0	0.0
4.	Are you assisted in achieving what is expected of you?	54	78.3	13	18.8	2	2.9	0	0.0
5.	Is a record kept of what you have achieved?	61	88.4	7	10.1	1	1.4	0	0.0
6.	Do you feel competency-based instruction can help you learn?	57	82.6	11	15.9	0	0.0	1	1.4

Table 6

Responses of the Office Supervision and Management Students (N = 16) to the Field-Test Evaluation Questionnaire

	Item	Response: Most of the time N	%	Some of the time N	%	Seldom N	%	Not at All N	%
1.	Are you informed of what is expected of you?	13	81.3	3	18.7	0	0.0	0	0.0
2.	Are specific standards made known to you?	12	75.0	4	25.0	0	0.0	0	
3.	Are you tested on what is expected of you?	15	93.8	1	6.2	0	0.0	0	
4.	Are you assisted in achieving what is expected of you?	14	87.5	2	12.5	0	0.0	0	0.0
5.	Is a record kept of what is expected of you?	15	93.8	1	6.2	0	0.0	0	0.0
6.	Do you feel competency-based instruction can help you learn?	11	68.8	5	31.2	0	0.0	0	0.0

percent to 82.4 percent and for Question 5, which asked whether a record is kept of what is achieved, from 75.0 percent to 98.6 percent. Interestingly, the percent of students responding to the "Most of the time" category for Question 6, regarding whether competency-based instruction can help one learn, decreased from 82.6 percent to 62.1 percent. Perhaps this decrease resulted from a feeling on the part of the students that as the school year progresses it becomes more difficult to keep up and that their ability to learn is not tied to any instructional procedure but rather to their own efforts.

For the Legal and Medical Office Procedures students, the field-test evaluation outcomes reported in Table 4 were similar to the outcomes for the Preassessment CBE Questionnaire outcomes reported in Table 2. The largest difference was for Question 6, an increase from 73.1 percent to 82.6 percent in the "Most of the time" category. Apparently, these students felt more strongly that competency-based instruction can help one learn than they did at the time of the preassessment.

For the Office Supervision and Management students, the field-test outcomes reported in Table 6 show both increases and decreases in "Most of the time" category responses from those reported for the Preassessment CBE Questionnaire in Table 3. However, since the number of students involved was relatively small, 16 for the field-test outcomes and 18 for the preassessment outcomes, caution must be exercised in interpreting the differences. The largest difference was for Question 6 regarding whether competency-based instruction can help one learn; the number of students responding to the "Most of the time" category decreased from 94.4 percent to 68.8 percent.

Considering that the preassessment questionnaire revealed that the students felt their courses were already being taught by a competency-based approach, the responses to the field-test evaluation questionnaire are in line with expectations. For the first five questions, which relate specifically to the

four competency-based education standards for vocational education in Virginia, the students recorded increases in the "Most of the time" category in all but three instances--Questions 2 and 5 for Legal and Medical Office Procedures students and Question 2 for the Office Supervision and Management students.

The field-test evaluation instrument completed by the teachers contained items as listed below. The teachers responded to the items on a Likert type scale with four response categories ranging from "Strongly Agree" to "Strongly Disagree." Responses to the items for the 6 teachers who participated in the project are also listed.

Item	Number Responding "Strongly Agree"	Number Responding "Agree"
1. The CBE Resource Guide has helped me use CBE procedures in my class.	4	2
2. The CBE Resource Guide provides a list of competencies that my students are expected to achieve.	5	1
3. The CBE Resource Guide provides measurable performance objectives for each competency that my students are to achieve.	3	3
4. The CBE Resource Guide has helped me establish procedures for informing students prior to instruction of expected performances.	5	1
5. The CBE Resource Guide has helped me measure student achievement on the basis of specific standards made known to them prior to instruction.	3	3
6. The CBE Resource Guide has helped me establish procedures for documenting student achievement of competencies.	3	3

The teachers' responses indicate that they found the guides to be of help in implementing competency-based procedures in their courses and in meeting the four competency-based standards for vocational education.

RESULTS

The major products developed through this project are competency-based instuctional resource guides for four business education offerings:

Legal Office Procedures
Medical Office Procedures
Office Supervision and Management
Recordkeeping

After initial development, the guides were reviewed by business teachers who specialize in each offering and their respective supervisors. Field-test versions of the guides were then developed and used by the teachers. The final guides were based on outcomes of the field test and the final review of the guides by the teachers and their supervisors. Title pages and tables of contents for the guides are provided in Appendix F. Each guide contains:

a. occupational/program information
b. task/competency list which includes duty/content area for the domain
c. performance objectives for each task/competency
d. enabling objectives for each performance objective
e. criterion-referenced measures for each task/competency
f. instructional activities
g. tool/equipment lists
h. A/V and text references for each task/competency
i. program/course descriptions
j. course outlines for each course
k. student organization information
l. classroom management systems
m. recording systems
n. resource listing

Other products developed include task/competency validation lists for the four offerings and validated lists of tasks/competencies for each. The validation lists appear in Appendix B, the validated lists in Appendix D. The lists were validated as follows:

Task/Competency List	Validators
Legal Office Procedures	18 Legal Professionals
Medical Office Procedures	18 Medical Professionals
Office Supervision and Management	21 Office Management Professionals
Recordkeeping	10 Accounting/Recordkeeping Experts 10 Business Education Supervisors 10 Recordkeeping Teachers

The project also involved development of procedures for evaluating the resource guides and the field test of their use. The evaluation included administration of Preassessment CBE Questionnaires to teachers field testing the guides and their students. The questionnaires contained six items focused on the four competency-based education standards adopted by Virginia for vocational education. Copies of the questionnaires can be found in Appendix E. Outcomes of the preassessment indicated that both students and teachers felt their classes to be competency-based at that time. The field-test evaluation instruments administered to the students after use of the guides by their teachers, contained the same six questions. Outcomes, generally, showed an increase in the students' perceptions of the degree to which their instruction was competency based. The field-test evaluation instrument completed by the teachers was designed to assess the impact that use of the guides had on their meeting Virginia's competency-based standards for vocational education. For all six items on the instrument, the teachers checked the "Strongly Agree" or "Agree" categories. Copies of the field-test evaluation instrument can be found in Appendix G.

Use of competency-based education in vocational offerings is a major objective in Virginia for increasing the effectiveness of the offerings in meeting student needs. Prior to this project, teachers of the four business education offerings included in it did not have resource guide materials nor model competency-based offerings available. The competency-based resource guides developed through this project along with the field test of the guides will facilitate the implementation of competency-based instruction in the four offerings. In addition, procedures followed in the project can be used for developing competency-based instructional resource guides for other vocational offerings.

APPENDIX A

CBE RESOURCE GUIDE FIELD-TEST AND REVIEW PERSONNEL

CBE RESOURCE GUIDE FIELD TEST AND REVIEW PERSONNEL

LEGAL OFFICE PROCEDURES

Esther Bailey, Business Education Supervisor, Norfolk City Public Schools
Dr. Mary Barber, Business Education Supervisor, Virginia Beach City Public Schools
Melvin Campbell, Business Education Supervisor, Virginia Department of Education
Judy Liles, Business Education Supervisor, Portsmouth City Public Schools
Lillie Logan, Business Instructor, Virginia Beach Vocational-Technical
Gail Ross, Business Instructor, I. C. Norcum High School, Portsmouth
Carolyn Snyder, Business Instructor, Norfolk Technical Center

MEDICAL OFFICE PROCEDURES

Esther Bailey, Business Education Supervisor, Norfolk City Public Schools
Dr. Mary Barber, Business Education Supervisor, Virginia Beach City Public Schools
Elaine Bright, Business Instructor, I. C. Norcum High School, Portsmouth
Melvin Campbell, Business Education Supervisor, Virginia Department of Education
Judy Liles, Business Education Supervisor, Portsmouth City Public Schools
Lillie Logan, Business Instructor, Virginia Beach Vocational-Technical
Carolyn Snyder, Business Instructor, Norfolk Technical Center

OFFICE SUPERVISOR AND MANAGEMENT

Melvin Campbell, Business Education Supervisor, Virginia Department of Education
Beverly Dopler, Business Education Specialist, Fairfax County Public Schools
Nancy Johnston, Business Instructor, The W. T. Woodson High School, Fairfax

RECORDKEEPING

Darlene Bailey, Business Instructor, Franklin County High School
Melvin Campbell, Business Education Supervisor, Virginia Department of Education
Rebecca Stanley, Head Business Department, Franklin County High School

APPENDIX B

TASK/COMPETENCY VALIDATION LISTS FOR:

LEGAL OFFICE PROCEDURES
MEDICAL OFFICE PROCEDURES
OFFICE SUPERVISION AND MANAGEMENT
RECORDKEEPING

Directions

COMPLETING THE LEGAL OFFICE PROCEDURES TASK/COMPETENCY VALIDATION LIST

1. As you assess the attached task/competency list, keep in mind the following description recommended by the Virginia Business Education Service for the legal office procedures course:

LEGAL OFFICE PROCEDURES

Grade Level: 12 Prerequisite: Stenography I*

Legal Office Procedures is a double-period occupational preparation course offered at the twelfth-grade level. Students develop skills in typewriting, communications, office machines operations, and records management as applied in a legal environment. Shorthand and transcription skills from Stenography I are further developed with emphasis on legal terminology and on their use in the preparation of legal documents. The course helps students develop personal employability skills and prepares them for employment in a variety of legal office settings.

*Stenography I is also a one-year, double-period occupational preparation course. It is offered at the eleventh-grade level and students entering it have completed one year of typewriting, a single period offering at the ninth- or tenth-grade level. Tasks/competencies on the attached list include those for Stenography I and Typewriting.

2. Place a check (✓) mark in the appropriate columns to indicate the value, from NOT APPLICABLE to ESSENTIAL, of each task/competency to the student preparing for an entry-level job in a legal office. Tasks/competencies listed are based on surveys of skills required on the job and on content teachers are currently emphasizing. In addition, list any tasks/competencies that you believe should be added at the end of each Learning Area and check the appropriate column for each one you have added.

3. Please provide the following information:

Name of your employing organization_____

Your present position_____

VALIDATION LIST

COURSE: LEGAL OFFICE PROCEDURES

GRADE LEVEL: 12

Page 1 of 9

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
COURT PROCEDURES	1. Describe how, when, where, by whom, and why jurors are chosen.				
	2. Determine the order of the cases to be heard in various local courts, given a court docket.				
	3. Determine through courtroom observation functions of various court personnel.				
	4. Based on courtroom observation, identify ten legal terms used in the courtroom and context in which each was used.				
	5. Determine outcomes and supporting reasons for one civil and one criminal case according to Virginia Law.				
	6. For three court cases, distinguish the court in which each would be tried.				
	7. Diagram the court system found in Virginia from Federal Supreme Court to General District Court.				
	8. Other (Please specify.):				
INANCIAL RECORDS	1. Complete legible check records and checks from source documents for five payments.				
	2. Endorse five checks using blank, restrictive, or full method of endorsement as appropriate for the situation.				
	3. Prepare three legible deposit slips involving checks, currency, and coins.				
	4. Prepare a simple bank reconciliation.				
	5. Compute five net pay amounts including calculation of gross earnings and deductions.				
	6. Complete and verify payroll for five employees when given time cards, payroll register, and individual employee earnings records.				

VALIDATION LIST

COURSE: LEGAL OFFICE PROCEDURES

GRADE LEVEL: 12

Page 2 of 9

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL	
FINANCIAL RECORDS (continued)	7. Prepare five typewritten or handwritten pay vouchers or cash slips from payroll records.					
	8. Extract information from a group of ten unpaid invoices.					
	9. Compute extensions and totals on five invoices.					
	10. Compute the allowable cash discounts and determine the net amount for five invoices.					
	11. Determine sales tax on five documents using available charts or by computations.					
	12. Complete from source documents four invoices in correct format.					
	13. Indicate on docket sheets, account sheets, and statements those clients that are on retainers as compared to those on fees only.					
	14. For five clients, post information from docket sheets to account sheets and prepare statements.					
	15. For three account situations, identify those that contain delinquent accounts.					
	16. For three account situations, identify those that would go into an escrow account.					
	17. Operate ten-key calculating equipment by touch.					
	18. Compute and verify amounts and total all items on ten business forms.					
	19. Determine office supplies needed for one month and complete order forms.					
	20. Other (Please specify.):					
GENERAL CLERICAL SKILLS	1. File ten documents using an alpha/numeric filing system.					

VALIDATION LIST

COURSE: LEGAL OFFICE PROCEDURES

GRADE LEVEL: 12

Page 3 of 9

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL	
GENERAL CLERICAL SKILLS (continued)	2. File ten documents by subject.					
	3. Prepare five cross-reference sheets.					
	4. Charge out five documents from files.					
	5. Retrieve five documents or items of information from files and provide written information when requested.					
	6. Maintain a tickler file that requires the performance of five tasks.					
	7. Prepare records for five new clients.					
	8. Update records for four clients.					
	9. Maintain forms file.					
	10. Justify the most appropriate method of duplication, stencil or photocopy for ten case situations.					
	11. Prepare two acceptable handwritten or typewritten stencils, using artwork and lettering when required.					
	12. Prepare an acceptable copy for duplication by the photocopy process.					
	13. Operate stencil or photocopy equipment to produce quality copies.					
	14. Change the ribbon, replace the paper tape, and make minor machine adjustments on calculators.					
	15. Clean, replace pads, and make minor machine adjustments on reprographic equipment.					
	16. Clean keys or elements and remove dust, change ribbon, and make machine adjustments on typewriters.					
	17. Open, stamp, sort, and route ten routine pieces of incoming mail.					
	18. Prepare ten letters for mailing by verifying addresses including ZIP codes, checking for enclosures, folding and inserting into appropriate envelopes, sealing, and determining postage.					

VALIDATION LIST

COURSE: LEGAL OFFICE PROCEDURES

GRADE LEVEL: 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL	
ENERAL CLERICAL KILLS ontinued)	19. Other (Please specify.):					
ECEPTIONIST CTIVITIES	1. Perform routine receptionist activities for five situations including scheduling of appointments.					
	2. Rearrange employer's calendar for five appointment changes.					
	3. Answer five routine calls and route to proper party, give non-confidential information, and take clear messages.					
	4. Discriminate among five incoming calls those which can be handled and those which must be referred to attorney.					
	5. Prepare written telephone messages for four situations.					
	6. Place one long distance and two local calls.					
	7. Identify organizations and individuals whose names, addresses, and telephone numbers should be maintained in a personal directory.					
	8. Prepare information employer needs for use during client conference.					
	9. Other (Please specify.):					
YPEWRITING, ENERAL	1. Typewrite straight copy at a minimum rate with an error tolerance acceptable for employment. (Civil Service minimum is 40 wpm with 3 errors for 5 minutes.)					

VALIDATION LIST

COURSE: LEGAL OFFICE PROCEDURES

GRADE LEVEL: 12

Page 5 of 9

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
TYPEWRITING, GENERAL (continued)	2. Typewrite from handwritten, edited rough-draft copy, or dictation two mailable business letters with special features and appropriate copies.				
	3. Typewrite from handwritten, edited rough-draft copy, or dictation three mailable letters in legal format.				
	4. Typewrite from handwritten, edited rough-draft copy, or dictation a short memorandum in specified format with appropriate copies and all errors corrected.				
	5. Typewrite addresses on ten envelopes at the rate of one per minute with all errors corrected.				
	6. Typewrite routine information on three short preprinted forms with the information placed in appropriate spaces, evenly aligned, and all errors corrected.				
	7. Typewrite from handwritten or edited rough-draft copy two short tables or statistical reports, such as a balance sheet, itinerary, bid, budget, or agenda, with information appropriately placed and all errors corrected.				
	8. Typewrite from handwritten or edited rough-draft copy a two-page manuscript with footnotes, a title page, and bibliography with all errors corrected.				
	9. Typewrite five mailing labels or file folder labels in correct format and with all errors corrected.				
	10. Typewrite from handwritten copy minutes of a meeting with all errors corrected.				
	11. Typewrite from handwritten, edited rough-draft copy, or dictation a speech.				
	12. Other (Please specify.):				
TYPEWRITING LEGAL INSTRUMENTS	1. Typewrite an affidavit.				
	2. Typewrite a legal document containing an acknowledgment.				

VALIDATION LIST

COURSE: LEGAL OFFICE PROCEDURES

GRADE LEVEL: 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
YPEWRITING LEGAL NSTRUMENTS continued)	3. Typewrite a legal sales contract.				
	4. Typewrite a deed on a printed form.				
	5. Typewrite a power of attorney.				
	6. Typewrite a special power of attorney.				
	7. Typewrite three types of notary statements.				
	8. Typewrite a valid will.				
	9. Typewrite two codicils to a valid will.				
	10. Typewrite two legal documents from various specialized areas (real estate, litigation, corporate, etc.).				
	11. Typewrite one agreement using legal cap and one on a prepared form.				
	12. Typewrite three complaints and summonses using legal cap and printed forms.				
	13. Typewrite two interrogatories using correct format and style on legal cap.				
	14. Typewrite one deposition using legal cap and one using printed form.				
	15. Typewrite two subpoenas using legal cap and two using legal form.				
	16. Other (Please specify.):				
ORD PROCESSING	1. Correctly divide words as required in written work.				
	2. Find and correct ten spelling or word division errors in legal documents.				
	3. Use correct legal and Latin terms as they occur in written or oral work.				

VALIDATION LIST

COURSE: LEGAL OFFICE PROCEDURES

GRADE LEVEL: 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL	
WORD PROCESSING (continued)	4. Transcribe in mailable form from recorded media one average-length letter and one average-length legal document.					
	5. Transcribe three short letters from dictation at typewriter.					
	6. Prepare three typewritten transcripts dictated from unfamiliar material that contain legal/Latin terminology.					
	7. Prepare two typewritten transcripts taken from office-style dictation that contain legal/Latin terminology.					
	8. Edit and revise three pieces of legal correspondence for accuracy of content, clarity of expression, and appropriateness of style.					
	9. Compose and typewrite simple business correspondence for three given situations.					
	10. Compose and typewrite a letter to a client making an appointment.					
	11. Operate text-editing equipment to record, edit, and play back legal correspondence.					
	12. Define commonly used word processing terms.					
	13. Identify the effects of word processing on office workers.					
	14. Other (Please specify.):					
PERSONAL EMPLOYABILITY SKILLS	1. Exhibit the attitudes and work habits necessary for good staff relations in a legal office.					

VALIDATION LIST

COURSE: LEGAL OFFICE PROCEDURES

GRADE LEVEL: 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
PERSONAL EMPLOYABILITY SKILLS (continued)	2. Exhibit self-control, persistence, and initiative in completing tasks on time.				
	3. Accept constructive criticism in a positive manner.				
	4. Exhibit traits associated with responsibility, such as productive use of time and economical use of supplies.				
	5. Evaluate personal work habits and attitudes.				
	6. Maintain regular and prompt attendance.				
	7. Follow oral or written instructions in the completion of tasks				
	8. Exhibit good grooming and appropriate attire for working in a legal office environment.				
	9. Other (Please specify.):				
JOB SEEKING SKILLS	1. Identify skills and personal traits and match them with available job opportunities.				
	2. Prepare a typewritten resume.				
	3. Prepare typewritten application forms so that applicant is presented favorably.				
	4. Compose and typewrite acceptable application letters.				
	5. Demonstrate acceptable behavior during a simulated job interview.				
	6. Prepare for the job interview by becoming acquainted with the legal specialty in which interested, preparing information about job competencies, and demonstrating appropriate appearance and personal conduct.				
	7. Compose and typewrite a positive and appropriate follow-up letter.				

VALIDATION LIST

COURSE: LEGAL OFFICE PROCEDURES

GRADE LEVEL: 12

Page 9 of 9

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL	
JOB SEEKING SKILLS (continued)	8. Use other appropriate follow-up procedures, such as telephoning and sending additional correspondence.					
	9. List sources of information for employment opportunities.					
	10. Compare and contrast working conditions and advancement opportunities in large and small, public and private, and urban and rural businesses and organizations.					
	11. Other (Please specify.):					
ORGANIZATIONAL SKILLS	1. Keep the area in and around the work station uncluttered.					
	2. Assemble supplies and information necessary to complete assigned tasks.					
	3. Plan work efficiently to meet deadlines.					
	4. Evaluate own work realistically.					
	5. Maintain an orderly office and reception area.					
	6. Keep client information confidential.					
	7. Refrain from criticizing an attorney to a client.					
	8. Other (Please specify.):					

Directions

COMPLETING THE MEDICAL OFFICE PROCEDURES TASK/COMPETENCY VALIDATION LIST

1. As you assess the attached task/competency list, keep in mind the following description recommended by the Virginia Business Education Service for the medical office procedures course:

MEDICAL OFFICE PROCEDURES

Grade Level: 12

Prerequisites: Clerk-Typist I* or Stenography I*

Medical Office Procedures is a one-year, double period occupational preparation course offered at the twelfth-grade level. Students develop skills in typewriting, communications, office machines operation, and records management as applied in a medical environment. Emphasis is placed on special skills required in medical offices including receptionist duties, medical ethics, and the prepartion of insurance claim forms. The course helps students develop personal employability skills and prepares them for employment in doctors' offices, nursing homes, medical clinics, insurance firms, and hospital records departments.

*Clerk-Typist I and Stenography I are also one-year, double-period occupational preparation courses. They are offered at the eleventh-grade level and students entering them have completed one year of typewriting, a single period offering at the ninth- or tenth-grade level. Tasks/competencies on the attached list include those for Clerk-Typist I or Stenography I and Typewriting.

2. Place a check (✓) mark in the appropriate columns to indicate the value from NOT APPLICABLE to ESSENTIAL, of each task/competency to the student preparing for an entry-level job in a medical office. Tasks/competencies listed are based on surveys of skills required on the job and on content teachers are currently emphasizing. In addition, list any tasks/competencies that you believe should be added at the end of each Learning Area and check the appropriate column for each one you have added.

3. Please provide the following information:

Name of your employing organization_____

Your present position_____

VALIDATION LIST

COURSE: MEDICAL OFFICE PROCEDURES

GRADE LEVEL: 12

Page 1 of 9

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
FINANCIAL RECORDS	1. Post directly to five patient ledger cards from source documents.				
	2. Prepare five patient statements for mailing.				
	3. Complete legible check records and checks from source documents for five payments.				
	4. Prepare three legible deposit slips involving checks, currency, and coins.				
	5. Prepare appropriate collection letters for three case situations.				
	6. Endorse five checks using blank, restrictive, or full method of endorsement as appropriate for the situation.				
	7. Prepare a simple bank reconciliation.				
	8. Compute five net pay amounts including calculation of gross earnings and deductions.				
	9. Complete and verify payroll for five employees when given time cards, payroll register, and individual employee earnings records.				
	10. Prepare five typewritten or handwritten pay vouchers or cash slips from payroll records.				
	11. Extract information from a group of ten unpaid invoices.				
	12. Compute extensions and totals on five invoices.				
	13. Determine sales tax on five documents using available charts or by computations.				
	14. Complete from source documents four invoices in correct format.				
	15. Compute and verify amounts and total all items on ten business forms.				
	16. Operate ten-key calculating equipment by touch.				
	17. Define commonly used data processing terms.				

VALIDATION LIST

COURSE: MEDICAL OFFICE PROCEDURES

GRADE LEVEL: 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
FINANCIAL RECORDS (continued)	18. Identify the effects of data processing on office work.				
	19. Other (Please specify.):				
GENERAL CLERICAL SKILLS	1. Index, code, sort, and file alphabetically five documents.				
	2. File numerically five documents.				
	3. Prepare five cross-reference sheets.				
	4. Charge out five documents from files.				
	5. Retrieve five documents or items of information from files and provide requested written information.				
	6. Maintain a tickler file that requires the performance of five tasks.				
	7. Justify the most appropriate method of duplication, stencil or photocopy for ten case situations.				
	8. Prepare two acceptable handwritten or typewritten stencils, using artwork and lettering when required.				
	9. Prepare an acceptable copy for duplication by the photocopy process.				
	10. Operate stencil or photocopy equipment to produce quality copies.				
	11. Change the ribbon, replace the paper tape, and make minor machine adjustments on calculators.				
	12. Clean, replace pads, and make minor machine adjustments on reprographic equipment.				
	13. Clean keys or elements and remove dust, change ribbon, and make machine adjustments on typewriters.				

VALIDATION LIST

COURSE: MEDICAL OFFICE PROCEDURES

GRADE LEVEL: 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
GENERAL CLERICAL SKILLS (continued)	14. Open, stamp, sort, and route ten pieces of incoming mail including: checks patients' histories insurance forms medical journals letters x-rays lab reports medicine samples				
	15. Prepare ten letters for mailing by verifying addresses including ZIP codes, checking for enclosures, folding and inserting properly into appropriate envelopes, sealing, and determining postage.				
	16. Prepare five pieces of specialized mail determining appropriate classification of each.				
	17. Other (Please specify.):				
INSURANCE	1. Complete a claim form for Blue Cross.				
	2. Complete a claim form for Blue Shield.				
	3. Complete a claim form for Medicare.				
	4. Complete a claim form for a private health insurance carrier.				
	5. Complete a claim form for Medicaid.				
	6. Complete a claim form for Workmen's Compensation.				
	7. Other (Please specify.):				

VALIDATION LIST

COURSE: MEDICAL OFFICE PROCEDURES

GRADE LEVEL: 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
TYPEWRITING	1. Typewrite straight copy at a minimum rate with an error tolerance acceptable for employment. (Civil Service minimum is 40 wpm with 3 errors for 5 minutes.)				
	2. Typewrite from handwritten or edited rough-draft copy three mailable business letters with special features and appropriate copies.				
	3. Typewrite from handwritten or edited rough-draft copy a short memorandum in specified format with appropriate copies and all errors corrected.				
	4. Typewrite addresses on ten envelopes at the rate of one per minute with all errors corrected.				
	5. Typewrite routine information on three short pre-printed forms with the information appropriately placed and all errors corrected.				
	6. Typewrite from handwritten or edited rough-draft copy two short tables or statistical reports, such as a balance sheet, itinerary, bid, budget, or agenda, with information appropriately placed and errors corrected.				
	7. Typewrite from handwritten or edited rough-draft copy a two-page manuscript with footnotes, a title page, and bibliography with all errors corrected.				
	8. Typewrite five index cards using information from various sources.				
	9. Typewrite five folder labels in correct format with all errors corrected.				
	10. Typewrite information from source documents to medical records.				
	11. Typewrite minutes of a meeting from handwritten copy with all errors corrected.				
	12. Typewrite a speech from rough-draft copy.				

VALIDATION LIST

COURSE: MEDICAL OFFICE PROCEDURES

GRADE LEVEL: 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
TYPEWRITING (continued)	13. Other (Please specify.):				
PATIENT PREPARATION	1. Verify and complete a patient information record.				
	2. Prepare patient for examination.				
	3. Find patient's weight and height.				
	4. Find patient's pulse rate.				
	5. Find patient's respiration rate.				
	6. Find patient's blood pressure.				
	7. Other (Please specify.):				
RECEPTIONIST ACTIVITIES	1. Perform routine receptionist activities for two situations involving greeting patients and visitors, making introductions, and scheduling appointments.				
	2. Keep an appointment book for two days including at least six appointments and/or cancellations.				
	3. Answer five routine calls and route to proper party, give non-confidential information, and take clear messages.				
	4. Place five simulated local and long distance calls of a routine nature, using the directory when necessary.				
	5. Prepare written telephone messages for four different situations.				
	6. Other (Please specify.):				

VALIDATION LIST

COURSE: MEDICAL OFFICE PROCEDURES

GRADE LEVEL: 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL	
ORD ROCESSING	1. Define 50 medical prefixes and suffixes, combining forms and word roots.					
	2. Translate 50 definitions into medical prefixes, suffixes, combining forms, or word roots.					
	3. Build 50 medical terms from definitions.					
	4. Spell from oral dictation 50 medical terms and supply their definitions.					
	5. Supply the medical terms for 30 frequently used medical abbreviations.					
	6. Supply abbreviations for 30 frequently used medical terms.					
	7. Transcribe from recorded media two letters of average length.					
	8. Transcribe from recorded media two medical reports.					
	9. Prepare three typewritten transcripts of unfamiliar materials dictated at 60 wpm for three minutes.					
	10. Review, edit, and revise two pieces of business correspondence for mailability using proofreader's symbols.					
	11. Compose and typewrite in mailable form two routine letters.					
	12. Operate text-editing equipment to record and play back three documents.					
	13. Define commonly used word processing terms.					
	14. Identify the effects of word processing on office workers.					
	15. Other (Please specify.):					

VALIDATION LIST

COURSE: MEDICAL OFFICE PROCEDURES

GRADE LEVEL: 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
PERSONAL EMPLOYABILITY SKILLS	1. Exhibit the attitudes and work habits necessary for good staff relations in a medical office.				
	2. Exhibit patience, sympathy, tact, and empathy toward all patients.				
	3. Exhibit self-control, persistence, and initiative in completing tasks on time.				
	4. Accept constructive criticism in a positive manner.				
	5. Exhibit traits associated with responsibility, such as productive use of time and economical use of supplies.				
	6. Evaluate personal work habits and attitudes.				
	7. Maintain regular and prompt attendance.				
	8. Follow oral or written instructions in the completion of tasks.				
	9. Exhibit good grooming and appropriate attire for working in a medical office environment.				
	10. Other (Please specify.):				
JOB SEEKING SKILLS	1. Identify skills and personal traits and match them with available job opportunities.				
	2. Prepare a typewritten resume.				
	3. Prepare typewritten application forms so that applicant is presented favorably.				
	4. Compose and typewrite acceptable application letters.				
	5. Demonstrate acceptable behavior during a simulated job interview.				

VALIDATION LIST

COURSE: MEDICAL OFFICE PROCEDURES

GRADE LEVEL: 12

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LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
JOB SEEKING SKILLS (continued)	6. Prepare for the job interview by becoming acquainted with the medical specialty in which interested, preparing information about job competencies, and demonstrating appropriate appearance and personal conduct.				
	7. Compose and typewrite a positive and appropriate follow-up letter.				
	8. Use other appropriate follow-up procedures, such as telephoning and sending additional correspondence.				
	9. List sources of information for employment opportunities.				
	10. Compare and contrast working conditions and advancement opportunities in large and small, public and private, urban and rural businesses and organizations.				
	11. Other (Please specify.):				
ORGANIZATIONAL SKILLS	1. Keep the area in and around the work station uncluttered.				
	2. Assemble supplies and information necessary to complete assigned tasks.				
	3. Plan work efficiently to meet deadlines.				
	4. Evaluate own work realistically.				
	5. Maintain an orderly office and reception area.				
	6. Keep patient information confidential.				
	7. Refrain from criticizing a doctor to a patient.				
	8. Refrain from activities that might be construed as advertising the doctor's services.				

VALIDATION LIST

COURSE: MEDICAL OFFICE PROCEDURES

GRADE LEVEL: 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
ORGANIZATIONAL SKILLS (continued)	9. Notify the doctor upon learning that a patient is under treatment by another doctor for the same condition.				
	10. Collect payments or send bills to other physicians or family members only as directed.				
	11. Refer calls from other physicians immediately.				
	12. Select appropriate procedures for handling medical emergencies.				
	13. Define role in preventing malpractice suits.				
	14. Other (Please specify.):				

Directions

COMPLETING THE OFFICE SUPERVISION AND MANAGEMENT
TASK/COMPETENCY VALIDATION LIST

1. As you assess the attached task/competency list, keep in mind the following description recommended by the Virginia Business Education Service for the office supervision and management course:

OFFICE SUPERVISION AND MANAGEMENT

Grade Level: 12 Prerequisites: None

Office Supervision and Management is a one-year, single period course offered on an elective basis for eleventh- or twelfth-grade students. It is supplemental to the occupational preparation offerings and provides skills that can help the student achieve job promotions. A course in the concepts and practices of office management, it is designed to demonstrate that knowledge of management techniques equips an individual to contribute more effectively to the overall goals of an organization. The course focuses on the managerial process and the functions of planning, organizing, staffing, directing, and controlling as they relate to the daily job of an office supervisor. Students are helped to examine career potentials in supervisory and administrative management occupations.

2. Place a check (✓) mark in the appropriate columns to indicate the value of each task/competency to the student--from NOT APPLICABLE to ESSENTIAL. In addition, list any task/competencies that you believe should be added at the end of each Learning Area and check the appropriate column for each task/competency you have added.

3. Please provide the following information:

Name of your employing organization_____

Your present position_____

VALIDATION LIST

COURSE: OFFICE SUPERVISION AND MANAGEMENT

GRADE LEVEL: 11 or 12

Page 1 of 5

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
PLANNING	1. Explain the role and need for forecasting in office management.				
	2. For a given situation, establish two specific management objectives for increasing office productivity.				
	3. Given a planning objective, explain how at least three factors would be involved in achieving the objective.				
	4. Use problem-solving steps to reach solutions to two office management problems.				
	5. Given a set of objectives, develop an office management plan.				
	6. Identify at least five factors to be considered when planning the use of office space.				
	7. Compare the advantages and disadvantages of traditional office space plans with open or landscape plans.				
	8. Other (Please specify.):				
ORGANIZING	1. Construct a simple line and staff organization chart.				
	2. Explain authority relationships shown on an organization chart.				
	3. Explain how span of supervision, delegation of authority, division of work, and unity of command relate to the effectiveness of office management.				
	4. Identify level of authority appropriate for handling two specific office problems.				
	5. Other (Please specify.):				

VALIDATION LIST

COURSE: OFFICE SUPERVISION AND MANAGEMENT

GRADE LEVEL: 11 or 12

Page 2 of 5

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL	
STAFFING	1. Identify information illegally requested in five interview or application questions.					
	2. Select the most qualified candidate for a specified position from three applications.					
	3. Given two case situations involving office employees with training needs, select appropriate training programs.					
	4. List advantages and disadvantages of two employee evaluation tools.					
	5. Other (Please specify.):					
DIRECTING	1. Distinguish between managerial and nonmanagerial activities.					
	2. Compare the methods and aims of the three basic schools of management--classical, human relations, and quantitative.					
	3. Compare advantages and disadvantages of various management styles.					
	4. Identify own management or leadership style.					
	5. Identify characteristics of an effective leader.					
	6. Relate supervisory effectiveness to communication skills.					
	7. Describe the most effective communication method for a given situation.					
	8. Given a case study, identify procedures for using the office grapevine to achieve management objectives.					
	9. Recommend ways to overcome three communication barriers.					
	10. Identify factors affecting morale.					

VALIDATION LIST

COURSE: OFFICE SUPERVISION AND MANAGEMENT

GRADE LEVEL: 11 or 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL	
DIRECTING (continued)	11. Given a case situation, identify ways to improve employee morale.					
	12. Analyze a disciplinary problem and suggest corrective procedures.					
	13. Compare techniques for motivating employees based on their individual needs.					
	14. Other (Please specify.):					
CONTROLLING	1. Identify causes for variation from productivity standards and prescribe corrective action.					
	2. Discuss the relationships among the components of an office control system.					
	3. Compare techniques of work simplification and purposes of each.					
	4. Describe equipment and procedures used in two information processing applications.					
	5. Identify advantages and disadvantages of a selected information processing system.					
	6. Explain the role of budgets as control devices.					
	7. Identify income and expense amounts that are inconsistent with budget allocations.					
	8. Identify specific factors contributing to the costs of two office operations.					
	9. State one objective for each of the following phases of records management: Records creation Records storage and retrieval Records retention Records disposition.					
	10. Identify three reasons for developing a records management program.					

VALIDATION LIST

COURSE: OFFICE SUPERVISION AND MANAGEMENT

GRADE LEVEL: 11 or 12

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LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
CONTROLLING (continued)	11. Other (Please specify.):				
CAREER EXPLORATION	1. Compare the responsibilities of a business owner, a supervisor, a manager, and another employee.				
	2. Complete a job analysis including tasks performed, skills required, educational preparation, job availability, and advantages/disadvantages of an office management/supervisory job.				
	3. Plan high school courses and determine post-secondary education required for an office management/supervisory career.				
	4. Select office management/supervisory careers that are best suited to personal attitudes/values.				
	5. Select office management/supervisory careers that are best suited to personal abilities.				
	6. Select office management/supervisory careers that are best suited to personal interests.				
	7. Select office management/supervisory careers that are best suited to own personality traits.				
	8. Select an office management/supervisory career of primary interest and explain why career was chosen.				
	9. Other (Please specify.):				
PERSONAL EMPLOYABILITY SKILLS	1. Exhibit the attitudes and work habits necessary for good interpersonal and employee/employer relations in the office.				

VALIDATION LIST

COURSE: OFFICE SUPERVISION AND MANAGEMENT

GRADE LEVEL: 11 or 12

Page 5 of 5

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL	
PERSONAL EMPLOYABILITY SKILLS (continued)	2. Exhibit self-control, persistence, and initiative in completing assignments on time.					
	3. Accept constructive criticism in a positive manner.					
	4. Exhibit traits associated with responsibility, such as bringing appropriate materials to class, using time productively, and economical use of supplies.					
	5. Evaluate personal work habits and attitudes.					
	6. Maintain regular and prompt attendance.					
	7. Follow oral or written instructions in the completion of assigned tasks.					
	8. Prepare a resume.					
	9. Prepare application forms, so applicant is presented favorably.					
	10. Demonstrate acceptable behavior during a simulated job interview.					
	11. Other (Please specify.):					

Directions

COMPLETING THE RECORDKEEPING
TASK/COMPETENCY VALIDATION LIST

1. As you assess the attached task/competency list, keep in mind the following description for the recordkeeping course recommended by the Virginia Business Education Service:

RECORDKEEPING

Grade Level: 11 or 12 Prerequisites: None

Recordkeeping is a single-period, one-year course offered on an elective basis for eleventh or twelfth-grade students. Both personal and business recordkeeping skills are developed so that accurate basic financial records can be kept. Business source documents and business procedures are emphasized as well as the formation of positive work habits and attitudes. Recordkeeping introduces students to double-entry bookkeeping procedures.

2. Place a check (✓) mark in the appropriate columns to indicate the value of each task/competency to the student--from NOT APPLICABLE to ESSENTIAL. In addition, list any tasks/competencies that you believe should be added at the end of each Learning Area and check the appropriate column for each task/competency you have added.

VALIDATION LIST

COURSE: RECORDKEEPING

GRADE LEVEL: 11 or 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
CORDKEEPING NDAMENTALS	1. Use recordkeeping terms as they occur in oral or in written work.				
	2. Record information legibly on personal and business documents.				
	3. Complete mathematical calculations including addition, subtraction, multiplication, and division of whole numbers, decimals, and fractions.				
	4. Locate all errors and use proper techniques to correct errors on assigned work.				
	5. Other (Please specify.):				
RSONAL RECORDS	1. Compile an estimated budget, record all income and expenses, and compare the actual outcome with the estimated budget for a period of one month.				
	2. Compute interest charges for five credit situations.				
	3. Compare cost of credit for three situations and select best credit source for each one.				
	4. Compile ownership record for items owned.				
	5. Determine net worth.				
	6. Identify types of records that should be stored.				
	7. Select locations for protection of various types of records.				
	8. Prepare a signature card to open a checking account.				
	9. Complete legible check stubs and checks for five payments.				
	10. Use correct endorsements on five checks.				
	11. Prepare three legible deposit slips.				

VALIDATION LIST

COURSE: RECORDKEEPING

GRADE LEVEL: 11 or 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
RSONAL RECORDS ontinued)	12. Prepare a simple bank reconciliation.				
	13. Describe the advantages of two types of savings accounts.				
	14. Complete two deposit and two withdrawal slips for a savings account.				
	15. Determine maturity dates for five notes.				
	16. Compute interest on five notes.				
	17. Use tax tables or tax rates to compute sales tax for five purchase amounts.				
	18. Use tax tables or tax rates to compute Federal income tax for three individuals.				
	19. Use tax tables or tax rates to compute state income tax for three individuals.				
	20. Prepare a 1040A Federal tax return.				
	21. Prepare a state income tax return.				
	22. Other (Please specify.):				
SINESS RECORDS	1. Prepare five sales slips.				
	2. Prepare five receipts.				
	3. Prepare two credit memos.				
	4. Transfer information from eight source documents to customers' accounts and compute balances.				
	5. Select exact coins and bills to be given in change for five transactions.				
	6. Prepare five petty cash vouchers, record the transactions, and follow the procedures for replenishing the fund.				

VALIDATION LIST

COURSE: RECORDKEEPING

GRADE LEVEL: 11 or 12

Page 3 of 5

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL	
SINESS RECORDS ontinued)	7. Prepare three purchase requisitions from source documents.					
	8. Prepare three purchase orders from source documents.					
	9. Prepare three invoices from source documents.					
	10. Transfer information from eight source documents to creditors' accounts and compute balances.					
	11. Compute gross earnings for five employees.					
	12. Compute five net pay amounts.					
	13. Record the weekly payroll for five employees in a payroll register.					
	14. Transfer payroll information for employees from payroll register to individual earnings records.					
	15. Prepare five payroll checks from payroll records.					
	16. Other (Please specify.):					
LING	1. File ten documents alphabetically.					
	2. File ten documents numerically.					
	3. File ten documents in alphabetic order according to subject.					
	4. Other (Please specify.):					
CCOUNTING NDAMENTALS	1. Use accounting terms as they occur in oral or in written work.					

VALIDATION LIST

COURSE: RECORDKEEPING

GRADE LEVEL: 11 or 12

LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL
:COUNTING NDAMENTALS .ontinued)	2. Prepare a beginning balance sheet.				
	3. Record ten transactions in T accounts and prove balances of the accounts.				
	4. Journalize the opening entry.				
	5. Journalize 20 transactions.				
	6. Open accounts and post 20 journal entries to the accounts.				
	7. Prepare a trial balance.				
	8. Prepare an income statement from a trial balance.				
	9. Prepare a balance sheet from a trial balance.				
	10. Other (Please specify.):				
?ERSONAL :MPLOYABILITY ;KILLS	1. Organize work materials for best use of time.				
	2. Plan work efficiently to meet deadlines.				
	3. Maintain an uncluttered area in and around desk.				
	4. Evaluate own performance realistically.				
	5. Work harmoniously with others on a group assignment.				
	6. Demonstrate attitudes of respect and cooperation with peers.				
	7. Accept constructive criticism in a positive manner.				
	8. Exhibit self-control in contributing to class discussions.				
	9. Exhibit traits that demonstrate responsibility including bringing proper materials to class, productive use of time, and economic use of supplies.				

VALIDATION LIST

COURSE: RECORDKEEPING

GRADE LEVEL: 11 or 12

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LEARNING AREA	TASK/COMPETENCY	NOT APPLICABLE	NICE TO KNOW	USEFUL	ESSENTIAL	
RSONAL PLOYABILITY ILLS ontinued)	10. Attend class regularly.					
	11. Arrive on time.					
	12. Exhibit persistence and initiative in completing assignments.					
	13. Follow oral and written instructions in completing assignments.					
	14. Identify personal responsibilities within a group assignment and follow through to completion.					
	15. Other (Please specify):					

APPENDIX C

POSITIONS OF BUSINESS RESPONDENTS TO
THE TASK/COMPETENCY VALIDATION LISTS FOR:

LEGAL OFFICE PROCEDURES
MEDICAL OFFICE PROCEDURES
OFFICE SUPERVISION AND MANAGEMENT

POSITIONS OF

LEGAL OFFICE PROCEDURES RESPONDENTS

Attorneys (7)

City Police Department, Lt. of Police and Manager of L.E.A.A. Grants

Legal Assistant

Legal Secretaries (5)

Legal Secretary-Office Manager

Legal Secretary-Personnel Manager

Paralegal

Supreme Court of Virginia, Clerk of Court

POSITIONS OF

MEDICAL OFFICE PROCEDURES RESPONDENTS

Dental Office, Business Manager

Hospital, Acting Manager, Word Processing

Hospital, Head Nurse, Emergency Room

Hospital, Manager, Central Files, Medical Records

Hospital, Medical Transcriptionist

Hospital, Supervisor, Emergency Room Registration

Hospital, Supervisor, Medical Records

Medical Center, Development Specialist

Physician

Physician's Office, Bookkeeping, Insurance Clerk

Physician's Office, Business Manager

Physician's Office, Head Nurse

Physician's Office, Medical Secretary-Assistant

Physician's Office, Office Manager (2)

Physician's Office, R.N.-Office Manager

Psychiatric Center, Director of Medical Records

State Health Department, Office Manager

POSITIONS OF

OFFICE SUPERVISION AND MANAGEMENT RESPONDENTS

Administrative Assistant to Senior Vice President, Merchandise Traffic, Railway Company

Administrative Officer, Bank

Administrator, Nursing Home

Assistant Director, Medical Information Medical Records Department, Hospital

Assistant Vice President and Assistant Manager, Bank

Associate Manager, Administrative Staffing, Corporation

Chief of Management Services, Town

Director of Administration, Food Stores

Employment Manager, Oil Corporation

Executive Vice President, Vending Company

Legal Administrator, Law Office

Office Manager, Insurance Company

Manager, Membership Administration, Insurance Company

Manager, Operations, Computer Services, Railway Company

Manager, Temporary Employment Service

Manager, Word Processing Department, Office Machines Company

Personnel Analyst, Department of the Navy

Personnel Director, Life Insurance Company

President, Office Equipment Company

Program Analysis Office, Department of Labor

Vice President-Treasurer, Natural Gas Company

APPENDIX D

VALIDATED TASK/COMPETENCY LISTS

LEGAL OFFICE PROCEDURES

VALIDATED TASK/COMPETENCY LIST

FINANCIAL RECORDS

1. For three account situations, identify those that would go into an escrow account.

From Stenography I:

1. Prepare three legible deposit slips involving checks, currency, and coins.

2. Operate ten-key calculating equipment by touch.

GENERAL CLERICAL SKILLS

1. File ten documents using an alpha/numeric filing system.

2. File ten documents by subject.

3. Maintain a tickler file that requires the performance of five tasks.

4. Prepare records for five new clients.

5. Update records for four clients.

6. Maintain forms file.

From Stenography I:

1. Retrieve five documents or items of information from files and provide written information when requested.

2. Change the ribbon, replace the paper tape, and make minor machine adjustments on calculators.

3. Clean keys or elements and remove dust, change ribbon, and make machine adjustments on typewriters.

4. Open, stamp, sort, and route ten routine pieces of incoming mail.

5. Prepare ten letters for mailing by verifying addresses including ZIP codes, checking for enclosures, folding and inserting into appropriate envelopes, sealing, and determining postage.

LEGAL OFFICE PROCEDURES (Continued)

RECEPTIONIST ACTIVITIES

1. Rearrange employer's calendar for five appointment changes.

2. Discriminate among five incoming calls those which can be handled and those which must be referred to attorney or supervisor.

3. Prepare written telephone messages for four situations.

4. Identify organizations and individuals whose names, addresses, and telephone numbers should be maintained in a personal directory.

5. Prepare information employer needs for use during client conference.

From Stenography I:

1. Perform routine receptionist activities for five situations including scheduling of appointments.

2. Answer five routine calls and route to proper party, give non-confidential information, and take clear messages.

3. Place one long distance and two local calls.

TYPEWRITING, GENERAL

1. Typewrite from handwritten, edited rough-draft copy, or dictation three mailable letters in legal format.

2. Typewrite from handwritten, edited rough-draft copy, or dictation two mailable business letters with special features and appropriate copies.

3. Typewrite from handwritten, edited rough-draft copy, or dictation a short memorandum in specified format with appropriate copies and all errors corrected.

From Stenography I:

1. Typewrite straight copy at a minimum rate with an error tolerance acceptable for employment.

2. Typewrite addresses on ten envelopes at the rate of one per minute with all errors corrected.

3. Typewrite routine information on three short preprinted forms with all information placed in appropriate spaces, evenly aligned, and all errors corrected.

LEGAL OFFICE PROCEDURES (Continued)

TYPEWRITING, GENERAL (Continued)

4. Typewrite from handwritten or edited rough-draft copy two short tables or statistical reports, such as a balance sheet, itinerary, bid, budget, or agenda, with information appropriately placed and all errors corrected.

5. Typewrite from handwritten or edited rough-draft copy a two-page manuscript with footnotes, a title page, and bibliography with all errors corrected.

6. Typewrite five mailing labels or file folder labels in correct format and with all errors corrected.

7. Typewrite from handwritten copy minutes of a meeting with all errors corrected.

8. Typewrite from handwritten, edited rough-draft copy, or dictation a speech.

TYPEWRITING LEGAL INSTRUMENTS

1. Typewrite an affidavit.

2. Typewrite a legal document containing an acknowledgment.

3. Typewrite a legal sales contract.

4. Typewrite a deed on a printed form.

5. Typewrite a power of attorney.

6. Typewrite a special power of attorney.

7. Typewrite three types of notary statements.

8. Typewrite a valid will.

9. Typewrite two codicils to a valid will.

10. Typewrite two legal documents from various specialized areas (real estate, litigation, corporate, etc.)

11. Typewrite one agreement using legal cap and one on a prepared form.

12. Typewrite three complaints and summonses using legal cap and printed forms.

13. Typewrite two interrogatories using correct format and style on legal cap.

LEGAL OFFICE PROCEDURES (Continued)

TYPEWRITING LEGAL INSTRUMENTS (Continued)

14. Typewrite one deposition using legal cap and one using printed form.

15. Typewrite two subpoenas using legal cap and two using legal form.

WORD PROCESSING

1. Correctly divide words as required in written work.

2. Find and correct ten spelling or word division errors in legal documents.

3. Use correct legal and Latin terms as they occur in written or oral work.

4. Transcribe in mailable form from recorded media one average-length letter and one average-length legal document.

5. Transcribe three short letters from dictation at typewriter.

6. Prepare three typewritten transcripts dictated from unfamiliar material that contain legal/Latin terminology.

7. Prepare two typewritten transcripts taken from office-style dictation that contain legal/Latin terminology.

8. Edit and revise three pieces of legal correspondence for accuracy of content, clarity of expression, and appropriateness of style.

9. Compose and typewrite simple business correspondence for three given situations.

10. Compose and typewrite a letter to a client making an appointment.

11. Operate text-editing equipment to record, edit, and play back legal correspondence.

PERSONAL EMPLOYABILITY SKILLS

1. Exhibit the attitudes and work habits necessary for good staff relations in a legal office.

2. Accept constructive criticism in a positive manner.

From Stenography I:

1. Exhibit self-control, persistence, and initiative in completing tasks on time.

2. Exhibit traits associated with responsibility, such as productive use of time and economical use of supplies.

LEGAL OFFICE PROCEDURES (Continued)

PERSONAL EMPLOYABILITY SKILLS (Continued)

3. Evaluate personal work habits and attitudes.

4. Maintain regular and prompt attendance.

5. Follow oral or written instructions in the completion of tasks.

6. Exhibit good grooming and appropriate attire for working in a legal office environment.

JOB SEEKING SKILLS

1. Prepare for the job interview by becoming acquainted with the legal specialty in which interested, preparing information about job competencies, and demonstrating appropriate appearance and personal conduct.

2. Prepare a typewritten resume.

From Stenography I:

1. Identify skills and personal traits and match them with available job opportunities.

2. Prepare typewritten application forms so that applicant is presented favorably.

3. Compose and typewrite acceptable application letters.

4. Demonstrate acceptable behavior during a simulated job interview.

ORGANIZATIONAL SKILLS

1. Evaluate own work realistically.

2. Maintain an orderly office and reception area.

3. Keep client information confidential.

4. Refrain from criticizing an attorney to a client.

From Stenography I:

1. Keep the area in and around the work station uncluttered.

2. Assemble supplies and information necessary to complete assigned tasks.

3. Plan work efficiently to meet deadlines.

MEDICAL OFFICE PROCEDURES

VALIDATED TASK/COMPETENCY LIST

GENERAL CLERICAL SKILLS

1. File numerically five documents.

2. Open, stamp, sort, and route ten pieces of incoming mail including:

   checks
   patients' histories
   insurance forms
   medical journals
   letters
   x-rays
   lab reports
   medicine samples

3. Prepare five pieces of specialized mail determining appropriate classification of each.

From Clerk-Typist I and Stenography I:

1. Index, code, sort, and file alphabetically five documents.

2. Retrieve five documents or items of information from files and provide requested written information.

3. Prepare an acceptable copy for duplication by the photocopy process.

4. Operate stencil or photocopy equipment to produce quality copies.

5. Change the ribbon, replace the paper tape, and make minor machine adjustments on calculators.

6. Clean keys or elements and remove dust, change ribbon, and make machine adjustments on typewriters.

7. Prepare ten letters for mailing by verifying addresses including ZIP codes, checking for enclosures, folding and inserting properly into appropriate envelopes, sealing, and determining postage.

INSURANCE

1. Complete a claim form for Blue Shield.

2. Complete a claim form for a private health insurance carrier.

MEDICAL OFFICE PROCEDURES (Continued)

INSURANCE (Continued)

3. Complete a claim form for Medicaid.

4. Complete a claim form for Workmen's Compensation.

TYPEWRITING

1. Typewrite information from source documents to medical records.

From Clerk-Typist I and Stenography I:

1. Typewrite straight copy at a minimum rate with an error tolerance acceptable for employment.

2. Typewrite from handwritten or edited rough-draft copy three mailable business letters with special features and appropriate copies.

3. Typewrite from handwritten or edited rough-draft copy a short memorandum in specified format with appropriate copies and all errors corrected.

4. Typewrite addresses on ten envelopes at the rate of one per minute with all errors corrected.

5. Typewrite routine information on three short preprinted forms with the information appropriately placed and all errors corrected.

6. Typewrite five folder labels in correct format with all errors corrected.

RECEPTIONIST ACTIVITIES

1. Keep an appointment book for two days including at least six appointments and/or cancellations.

2. Prepare written telephone messages for four different situations.

3. Verify and complete a patient information record.

From Clerk-Typist I and Stenography I:

1. Perform routine receptionist activities for two situations involving greeting patients and visitors, making introductions, and scheduling appointments.

2. Answer five routine calls and route to proper party, give non-confidential information, and take clear messages.

MEDICAL OFFICE PROCEDURES (Continued)

RECEPTIONIST ACTIVITIES (Continued)

3. Place five simulated local and long distance calls of a routine nature, using the directory when necessary.

WORD PROCESSING

1. Define 50 medical prefixes and suffixes, combining forms and word roots.

2. Translate 50 definitions into medical prefixes, suffixes, combining forms, or word roots.

3. Build 50 medical terms from definitions.

4. Spell from oral dictation 50 medical terms and supply their definition.

5. Supply the medical terms for 30 frequently used medical abbreviations.

6. Supply abbreviations for 30 frequently used medical terms.

7. Transcribe from recorded media two letters of average length.

8. Transcribe from recorded media two medical reports.

9. Compose and typewrite in mailable form two routine letters.

PERSONAL EMPLOYABILITY SKILLS

1. Exhibit patience, sympathy, tact, and empathy toward all patients.

2. Accept constructive criticism in a positive manner.

3. Exhibit the attitudes and work habits necessary for good staff relations in a medical office.

4. Exhibit good grooming and appropriate attire for working in a medical office environment.

From Clerk-Typist I and Stenography I:

1. Exhibit self-control, persistence, and initiative in completing tasks on time.

2. Exhibit traits associated with responsibility, such as productive use of time and economical use of supplies.

3. Evaluate personal work habits and attitudes.

MEDICAL OFFICE PROCEDURES (Continued)

PERSONAL EMPLOYABILITY SKILLS (Continued)

4. Maintain regular and prompt attendance.

5. Follow oral or written instructions in the completion of tasks.

JOB SEEKING SKILLS

1. Prepare a typewritten resume.

2. Prepare for the job interview by becoming acquainted with the medical specialty in which interested, preparing information about job competencies, and demonstrating appropriate appearance and personal conduct.

3. List sources of information for employment opportunities.

From Clerk-Typist I and Stenography I:

1. Identify skills and personal traits and match them with available job opportunities.

2. Prepare typewritten application forms so that applicant is presented favorably.

3. Compose and typewrite acceptable application letters.

4. Demonstrate acceptable behavior during a simulated job interview.

ORGANIZATIONAL SKILLS

1. Evaluate own work realistically.

2. Maintain an orderly office and reception area.

3. Keep patient information confidential.

4. Refrain from criticizing a doctor to a patient.

5. Refrain from activities that might be construed as advertising the doctor's services.

6. Notify the doctor upon learning that a patient is under treatment by another doctor for the same condition.

7. Collect payments or send bills to other physicians or family members only as directed.

8. Refer calls from other physicians immediately.

MEDICAL OFFICE PROCEDURES (Continued)

ORGANIZATIONAL SKILLS (Continued)

9. Select appropriate procedures for handling medical emergencies.

10. Define role in preventing malpractice suits.

From Clerk-Typist I and Stenography I:

1. Keep the area in and around the work station uncluttered.

2. Assemble supplies and information necessary to complete assigned tasks.

3. Plan work efficiently to meet deadlines.

OFFICE SUPERVISION AND MANAGEMENT

VALIDATED TASK/COMPETENCY LIST

PLANNING

1. Explain the role and need for forecasting in office management.
2. For a given situation, establish two specific management objectives for increasing office productivity.
3. Use problem-solving steps to reach solutions to two office management problems.
4. Given a set of objectives, develop an office management plan.
5. Explain the impact of changing office technology on the office worker.

ORGANIZING

1. Construct a simple line and staff organization chart.
2. Explain authority relationships shown on an organization chart.
3. Explain how span of supervision, delegation of authority, division of work, and unity of command relate to the effectiveness of office management.
4. Identify level of authority appropriate for handling two specific office problems.

STAFFING

1. Identify information illegally requested in five interview or application questions.
2. Select the most qualified candidate for a specified position from three applications.
3. Given two case situations involving office employees with training needs, select appropriate training programs.

DIRECTING

1. Identify characteristics of an effective leader.
2. Relate supervisory effectiveness to communication skills.

OFFICE SUPERVISION AND MANAGEMENT (continued)

DIRECTING (continued)

3. Describe the most effective communication method for a given situation.

4. Recommend ways to overcome three communication barriers.

5. Given a case situation, identify ways to improve employee morale.

6. Analyze a disciplinary problem and suggest corrective procedures.

7. Compare techniques for motivating employees based on their individual needs.

CONTROLLING

1. Identify causes for variation from productivity standards and prescribe corrective action.

2. Explain the role of budgets as control devices.

3. Identify income and expense amounts that are inconsistent with budget allocations.

4. Identify specific factors contributing to the cost of two office operations.

5. State one objective for each of the following phases of records management:

   Records creation
   Records storage and retrieval
   Records retention
   Records disposition

6. Identify three reasons for developing a records management program.

7. Evaluate an employee's performance relative to performance objectives.

CAREER EXPLORATION

1. Compare the responsibilities of a business owner, a supervisor, a manager, and another employee.

2. Complete a job analysis including tasks performed, skills required, education preparation, job availability, and advantages/disadvantages of an office management/supervisory job.

OFFICE SUPERVISION AND MANAGEMENT (continued)

PERSONAL AND EMPLOYABILITY SKILLS

1. Exhibit the attitudes and work habits necessary for good interpersonal and employee-employer relations in the office.
2. Exhibit self-control, persistence, and initiative in completing assignments on time.
3. Accept constructive criticism in a positive manner.
4. Exhibit traits associated with responsibility, such as bringing appropriate materials to class, using time productively, and economical use of supplies.
5. Evaluate personal work habits and attitudes.
6. Maintain regular and prompt attendance.
7. Follow oral or written instructions in the completion of assigned tasks.
8. Prepare a resume.
9. Prepare application forms, so applicant is presented favorably.
10. Demonstrate acceptable behavior during a simulated job interview.

RECORDKEEPING

VALIDATED TASK/COMPETENCY LIST

RECORDKEEPING FUNDAMENTALS

1. Use recordkeeping terms as they occur in oral or in written work.
2. Record information legibly on personal records and business documents.
3. Complete mathematical calculations including addition, subtraction, multiplication, and division of whole numbers, decimals and fractions.
4. Locate errors and use proper techniques to correct them on records.

PERSONAL RECORDS

1. Compute interest charges for various credit situations.
2. Compare cost of credit and select best credit source.
3. Complete legible check stubs and checks.
4. Use correct endorsements on checks.
5. Prepare legible deposit slips for a checking account.
6. Prepare a bank reconciliation for a checking account that contains mathematical errors.
7. Complete deposit and withdrawal slips for a savings account.
8. Use tax tables or tax rates to compute sales taxes.
9. Use tax tables or tax rates to compute Federal income taxes for individuals.
10. Use tax tables or tax rates to compute state income taxes for individuals.
11. Prepare a 1040A Federal tax return.
12. Prepare a state income tax return.

BUSINESS RECORDS

1. Prepare sales slips.
2. Prepare receipts.

RECORDKEEPING (continued)

BUSINESS RECORDS (continued)

3. Prepare credit memos.
4. Select exact coins and bills to be given in change and count change orally.
5. Prepare purchase orders from source documents.
6. Prepare invoices from source documents.
7. Transfer information from source documents to customers' and creditors' accounts and compute balances.
8. Prepare petty cash vouchers, record transactions, and replenish the fund.
9. Compute gross earnings for employees.
10. Compute net pay amounts.
11. Record weekly payroll for employees in a payroll register.
12. Transfer employees information from payroll register to individual earnings records.
13. Prepare payroll checks from payroll records.
14. Describe how information from business documents can be processed through computers.
15. File documents alphabetically.

ACCOUNTING FUNDAMENTALS

1. Use accounting terms as they occur in oral or in written work.
2. Record transactions in T accounts and prove balances of the accounts.
3. Journalize an opening entry.
4. Journalize transactions.
5. Open accounts and post journal entries to the accounts.
6. Prepare a trial balance.

RECORDKEEPING (continued)

PERSONAL EMPLOYABILITY SKILLS

1. Organize work materials for best use of time.
2. Plan work efficiently to meet deadlines.
3. Evaluate own performance realistically.
4. Work harmoniously with others on a group assignment.
5. Demonstrate attitudes of respect and cooperation with peers.
6. Accept constructive criticism in a positive manner.
7. Exhibit self-control in contributing to class discussions.
8. Exhibit traits that demonstrate responsibility.
9. Attend class regularly.
10. Arrive on time.
11. Exhibit persistence and initiative in completing assignments.
12. Follow oral and written instructions in completing assignments.
13. Identify and complete personal responsibilities with a group assignment.

APPENDIX E

PREASSESSMENT CBE QUESTIONNAIRES

DATE: _____

TEACHER

PREASSESSMENT CBE QUESTIONNAIRE

1. What type of competency-based education (CBE) training have you had? Check (✓) all that apply and provide details describing the training.

_____ Formal course(s): _____

_____

_____ In-service Activities: _____

_____

_____ Other: _____

_____

2. Do you currently use any CBE resource materials? _____ (yes) _____ (no)
If yes, please identify them.

_____

_____

_____

3. Please answer the questions below by checking (✓) the appropriate column for each item.	Most of the time	Some of the time	Seldom	Not at All
a. Do you use CBE procedures in your classes?				
b. Do you maintain a list or lists of competencies that your students are expected to achieve?				
c. Do you have a measurable performance objective stated for each listed competency?				
d. Do you inform students prior to instruction of expected performance?				
e. Do you measure student achievement on the basis of specific standards made known to them prior to instruction?				
f. Do you document student achievement of competencies?				

DATE:_____

STUDENT

PREASSESSMENT CBE QUESTIONNAIRE

Vocational educators in Virginia are attempting to provide their students with competency-based instruction. This means that your teacher:

- informs you of what is expected before instruction,
- tests you on what is expected,
- assists you in learning what is expected, and
- keeps a record of what you have achieved.

Please answer the questions below for this class by checking (✓) the appropriate column for each item.

	Most of the time	Some of the time	Seldom	Not at All
1. Are you informed of what is expected of you?	____	____	____	____
2. Are specific standards for what is expected made known to you?	____	____	____	____
3. Are you tested on what is expected of you?	____	____	____	____
4. Are you assisted in achieving what is expected of you?	____	____	____	____
5. Is a record kept of what you have achieved?	____	____	____	____
6. Do you feel that competency-based instruction can help you learn?	____	____	____	____

APPENDIX F

TITLE PAGES AND TABLES OF CONTENT
FOR THE
FOUR CBE INSTRUCTIONAL RESOURCE GUIDES

INSTRUCTIONAL RESOURCE GUIDE

FOR

COMPETENCY-BASED EDUCATION

IN

LEGAL OFFICE PROCEDURES

B. June Schmidt

Project Director

This instructional resource guide was developed for the Virginia Department of Education, Divisions of Vocational and Adult Education under the provisions of a Project Grant VA-82-C-132-2-AD-001 awarded to Virginia Polytechnic Institute and State University.

May, 1983

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TASK ANALYSIS FOR LEGAL OFFICE PROCEDURES 25

1. Financial Records

    1.1 Identify account situations that should be held in an escrow account.

2. General Clerical Skills

    2.1 File documents using an alpha/numeric filing system.
    2.2 File documents by subject.
    2.3 Maintain a tickler file that requires the performance of various tasks.
    2.4 Prepare records for new clients.
    2.5 Update records for clients.
    2.6 Maintain forms file.

3. Receptionist Activities

    3.1 Rearrange employer's (attorney's) calendar for appointment changes.
    3.2 Discriminate among incoming calls those that must be referred to attorney or supervisor.
    3.3 Prepare written telephone messages for various situations.
    3.4 Identify organizations and individuals whose names, addresses, and telephone numbers are to be maintained in a personal directory.
    3.5 Prepare information employer (attorney) needs for use during client conference.

4. Typewriting, General

4.1 Prepare from handwritten, edited rough-draft copy, or dictation, mailable letters in legal format.
4.2 Prepare from handwritten, edited rough-draft copy, or dictation, mailable business letters with special features and appropriate copies.
4.3 Prepare from handwritten, edited rough-draft copy, or dictation, a short memorandum in specified format.

5. Typewriting Legal Instruments

5.1 Typewrite an affidavit.
5.2 Typewrite a legal document containing an acknowledgment.
5.3 Typewrite a legal sales contract.
5.4 Typewrite a deed on a printed form.
5.5 Typewrite a power of attorney.
5.6 Typewrite a special power of attorney.
5.7 Typewrite a valid will.
5.8 Typewrite codicils to a valid will.
5.9 Typewrite legal documents from various specialized areas.
5.10 Typewrite agreement using legal cap and prepared form.
5.11 Typewrite complaints and summons using legal cap and printed forms.
5.12 Typewrite interrogatories using correct format and style on legal cap.
5.13 Typewrite depositions using both legal cap and printed forms.
5.14 Typewrite subpoenas using legal cap and legal forms.

6. Word Processing

6.1 Find and correct spelling or word division errors in legal documents.
6.2 Use correct legal and Latin terms as they occur in written or oral work.
6.3 Transcribe in mailable form from recorded media average-length letters and documents.
6.4 Transcribe letters from dictation at typewriter.
6.5 Prepare typewritten transcripts dictated from unfamiliar material that contains legal/Latin terminology.
6.6 Prepare typewritten transcripts taken from office-style dictation that contains legal/Latin terminology.
6.7 Edit and revise legal correspondence for accuracy of content, clarity of expression, and appropriateness of style.
6.8 Compose and typewrite simple business correspondence for various situations.
6.9 Operate text-editing equipment to record, edit, and play back legal correspondence.

7. Legal Office Ethics

7.1 Keep client information confidential.
7.2 Refrain from criticizing an attorney to a client.

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8. Job Seeking Skills

   8.1 List sources of information for employment opportunities.
   8.2 Prepare for a job interview by becoming acquainted with the legal specialty in which interested, preparing information about job competencies, and demonstrating knowledge of appropriate appearance and personal conduct.
   8.3 Prepare a typewritten resume.

9. Personal Employability Skills

   9.1 Participate in Future Business Leaders of America.
   9.2 Accept constructive criticism in a positive manner.
   9.3 Exhibit the attitudes and work habits necessary for good staff relations in a legal office.
   9.4 Produce work of satisfactory quality.
   9.5 Maintain an orderly office and reception area.
   9.6 Exhibit good grooming and appropriate attire for working in a legal office.

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INSTRUCTIONAL RESOURCE GUIDE

FOR

COMPETENCY-BASED EDUCATION

IN

MEDICAL OFFICE PROCEDURES

B. June Schmidt

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1. General Clerical Skills

   1.1 Numerically file documents.
   1.2 Process incoming mail including: checks, patients' histories, insurance forms, medical journals, letters, x-rays, lab reports, and medicine samples.
   1.3 Prepare specialized mail determining appropriate classifications and fees.
   1.4 Collect payments or send bills to other physicians or family members only as directed.

2. Insurance

   2.1 Complete a claim form for Blue Shield.
   2.2 Complete a claim form for a private health insurance carrier.
   2.3 Complete a claim form for Medicare.
   2.4 Complete a claim form for Workers' Compensation

3. Typewriting

   3.1 Typewrite information from source documents to medical records.

4. Receptionist Activities

   4.1 Keep an appointment book including appointments and/or cancellations.
   4.2 Prepare written telephone messages for various situations.
   4.3 Refer calls from other physicians immediately.
   4.4 Verify and complete a patient information record.
   4.5 Select appropriate procedures for handling medical emergencies.

5. Word Processing

   5.1 Define medical prefixes, suffixes, word roots, or combined forms.
   5.2 Translate definitions into medical prefixes, suffixes, word roots, or combined forms.
   5.3 Build medical terms from definitions.
   5.4 From oral dictation spell medical terms and supply their definitions.
   5.5 Supply medical terms for frequently used abbreviations.
   5.6 Supply medical abbreviations for frequently used medical terms.
   5.7 Transcribe from recorded media medically related letters of average length.
   5.8 Transcribe from recorded media medical reports.
   5.9 Compose and typewrite letters in mailable form.

6. Medical Office Ethics

   6.1 Exhibit patience, sympathy, tact, and empathy toward all patients.
   6.2 Keep patient information confidential.
   6.3 Refrain from criticizing a physician to a patient.
   6.4 Refrain from activities that might be construed as advertising the physician's services.
   6.5 Notify physician upon learning that a patient is under treatment by another physician for the same condition.
   6.6 Define role in preventing malpractice suits.

7. Job Seeking Skills

   7.1 List sources of information for employment opportunities.
   7.2 Prepare for a job interview by becoming acquainted with the medical specialty in which interested, preparing information about job competencies, and demonstrating appropriate appearance and personal conduct.
   7.3 Prepare a typewritten resume.

8. Personal Employability Skills

   8.1 Participate in Future Business Leaders of America.
   8.2 Accept constructive criticism in a positive manner.
   8.3 Display the attitudes necessary for good staff relations in a medical office.
   8.4 Produce work of satisfactory quality.
   8.5 Maintain an orderly office and reception area.
   8.6 Exhibit good grooming and appropriate attire for working in a medical office.

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1. Planning

1.1 Explain the role of and need for forecasting.
1.2 For a given situation, establish specific management objectives and develop plan for meeting those objectives.
1.3 Use problem-solving steps to reach solutions to office management problems.
1.4 Explain the impact of changing office technology on the office worker.

2. Organizing

2.1 Construct a simple line and staff organization chart.
2.2 Explain authority relationships shown on an organizational chart.
2.3 Explain how span of supervision, delegation of authority, division of work, and unit of command relate to the effectiveness of office management.

3. Staffing

3.1 Develop a plan for identifying future staffing needs of an office.
3.2 Select the most qualified candidate for a specified position from various applications.
3.3 Given case situations involving office employees with training needs, select appropriate training program.
3.4 Evaluate employee's performance relative to performance objective.

4. Directing

   4.1 Identify characteristics of an effective leader.
   4.2 Recommend ways to overcome communication barriers.
   4.3 Compare techniques for motivating employees based on their individual needs.

5. Controlling

   5.1 Explain the role of budgets as control devices.
   5.2 Identify specific factors contributing to the cost of office operations.

6. Job Seeking Skills

   6.1 Compare the responsibilities of an upper-level manager, middle-manager, and first-level supervisor.
   6.2 Complete a job analysis including tasks performed, skills required, educational preparation, job availability, and advantages/disadvantages of an office management/supervisory job.
   6.3 Compare responsibilities and educational preparation for managers in different fields, i.e., marketing, production, finance, personnel, public/non-profit organizations.
   6.4 Prepare a resume.
   6.5 Prepare application forms so applicant is presented favorably.
   6.6 Demonstrate acceptable behavior during a simulated job interview.

7. Personal Employability Skills

   7.1 Participate in Future Business Leaders of America.
   7.2 Follow oral and written instructions in completing assignments.
   7.3 Demonstrate attitutes of respect and cooperation toward others.
   7.4 Exhibit traits that demonstrate responsibility.
   7.5 Organize work efficiently to meet deadlines and for best use of time.
   7.6 Exhibit persistence and initiative in completing assignments on time.
   7.7 Attend class regularly and arrive on time.

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1. Recordkeeping Fundamentals

1.1 Use recordkeeping terms as they occur in written work.
1.2 Record information legibly on personal records and business documents.
1.3 Complete mathematical calculations including addition, subtraction, multiplication, and division of whole numbers, decimals, and fractions.
1.4 Locate errors and use proper techniques to correct them on assigned records.

2. Personal Records

2.1 Compute interest charges for various credit situations.
2.2 Compare cost of credit and select best credit source.
2.3 Complete legible check stubs and checks.
2.4 Endorse checks correctly.
2.5 Prepare legible deposit slips for a checking account.

2.6 Prepare a bank reconciliation for a checking account that contains mathematical errors.
2.7 Complete deposit and withdrawal slips for a savings account.
2.8 Compute sales tax amounts using tax tables or tax rates.
2.9 Prepare a 1040A Federal income tax return form.

3. Business Records

3.1 Prepare sales slips.
3.2 Prepare receipts.
3.3 Select exact coins and bills to be given in change and count change orally.
3.4 Prepare purchase orders from source documents.
3.5 Prepare invoices from source documents.
3.6 Transfer information from source documents to customers' and creditors' accounts and compute balances.
3.7 Prepare petty cash vouchers, record transactions, and replenish the fund.
3.8 Compute gross earnings for employees.
3.9 Compute net pay amounts.
3.10 Record weekly payroll for employees in a payroll register.
3.11 Transfer employees information from register to individual earnings records.
3.12 Prepare payroll checks from payroll records.
3.13 Describe how information from business documents can be processed through computers.
3.14 File documents alphabetically.

4. Accounting Fundamentals

4.1 Use accounting terms as they occur in written work.
4.2 Record transactions in T-accounts and prove balances of the accounts.
4.3 Journalize an opening entry.
4.4 Journalize transactions.
4.5 Open accounts and post journal entries to the accounts.
4.6 Prepare a trial balance.

5. Personal Employability Skills

5.1 Join and participate in activities of the Future Business Leaders of America.
5.2 Follow oral and written instructions in completing assignments.
5.3 Demonstrate attitudes of respect and cooperation toward others.
5.4 Exhibit traits that demonstrate responsibility.
5.5 Organize work efficiently to meet deadlines and for best use of time.
5.6 Exhibit persistence and initiative in completing assignments.
5.7 Attend class regularly and arrive on time.

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APPENDIX G

FIELD-TEST EVALUATION INSTRUMENTS

DATE: _____

TEACHER

CBE RESOURCE GUIDE EVALUATION INSTRUMENT

Vocational educators in Virginia are attempting to provide their students with competency-based instruction. This means that:

- You inform your students of what is expected before instruction.
- You test your students on what is expected.
- You assist your students in learning what is expected.
- You keep a record of what your students have achieved.

The CBE Resource Guide you have been using is intended to help you use competency-based procedures in your classes. Please evaluate the usefulness of the guide by responding to this instrument.

Rate each item by checking (✓) the appropriate column.

	Strongly Agree	Agree	Disagree	Strongly Disagree
1. The CBE Resource Guide has helped me use CBE procedures in my classes.	_____	_____	_____	_____
2. The CBE Resource Guide provides a list of competencies that my students are expected to achieve.	_____	_____	_____	_____
3. The CBE Resource Guide provides measurable performance objectives for each competency that my students are to achieve.	_____	_____	_____	_____
4. The CBE Resource Guide has helped me establish procedures for informing students prior to instruction of expected performances.	_____	_____	_____	_____
5. The CBE Resource Guide has helped me measure student achievement on the basis of specific standards made known to them prior to instruction.	_____	_____	_____	_____
6. The CBE Resource Guide has helped me establish procedures for documenting student achievement of competencies.	_____	_____	_____	_____

DATE: _____

STUDENT

CBE QUESTIONNAIRE

Vocational educators in Virginia are attempting to provide their students with competency-based instruction. This means that your teacher:

- informs you of what is expected before instruction,
- tests you on what is expected,
- assists you in learning what is expected, and
- keeps a record of what you have achieved.

Please answer the questions below for this class by checking (✓) the appropriate column for each item.

	Most of the time	Some of the time	Seldom	Not at All
1. Are you informed of what is expected of you?	_____	_____	_____	_____
2. Are specific standards for what is expected made known to you?	_____	_____	_____	_____
3. Are you tested on what is expected of you?	_____	_____	_____	_____
4. Are you assisted in achieving what is expected of you?	_____	_____	_____	_____
5. Is a record kept of what you have achieved?	_____	_____	_____	_____
6. Do you feel competency-based instruction can help you learn?	_____	_____	_____	_____

APPENDIX H

VIRGINIA VOCATIONAL AND ADULT EDUCATION
CBE STANDARDS: REQUIREMENTS AND CRITERIA

VIRGINIA VOCATIONAL AND ADULT EDUCATION
CBE STANDARDS: REQUIREMENTS AND CRITERIA

(VIRGINIA, 1980)

CBE STANDARD	REQUIREMENTS	CRITERIA
I. Role-relevant competencies that include standards are identified and stated.	1. Validated task/competency list for each vocational program.	1.1 Lists to be based on V-TECS, IDECC, state approved lists, or other researched materials.
		1.2 Where researched task/competency lists are not available appropriate methods and resources will be used to validate the lists.
		1.3 Task/competency lists will include role-relevant competencies for occupational, consumer and homemaking, industrial arts, and orientation/exploration experiences.
		1.4 Lists should be reviewed by local or state vocational supervisory staff
	2. A performance objective for each validated task/competency.	2.1 Performance objectives to include the psychomotor cognitive and affective domains.
		2.2 Each performance objective shall include the condition, performance and standard for each task/competency.
II. Competencies are specified to students prior to instruction.	1. A system exists for providing task/competency information to students prior to instruction.	1.1 The system will provide specific information concerning the tasks/competencies in a vocational program, course or unit of instruction.
		1.2 The system will include one or more of the following types of information: Performance objectives, competency profiles, checksheets, training plans or contracts.
III. Criterion-referenced measures are used to measure achievement of competencies.	1. A criterion-referenced measure for each validated task/competency.	1.1 The CRM is a test item, test, or a statement on how testing and/or evaluation will be conducted.
	2. A criterion-based testing and evaluation procedure which tests the performance objective.	2.1 The testing and evaluation procedure is based on the predetermined standard for the task/competency as stated in the performance objective rather than on other students' accomplishments.

CBE STANDARD	REQUIREMENTS	CRITERIA
IV. A system exists for documenting the competencies achieved by each student.	1. A system that has task/competency records/profiles for student achievement in each vocational program, course or unit.	1.1 The task/competency records/profiles will include: (a) student name (b) program title (c) listing of all terminal competencies (d) enabling competencies if needed (e) rating scale (f) method for authenticating record
		1.2 The documentation is available for articulation, student achievement record and employer information.
		1.3 Task/competency records/profiles should be part of the students' official school record.